

Community Library Network[®]

KOOTENAI & SHOSHONE COUNTIES

POLICY ON RETENTION OF DOCUMENTS

Board Approval Date: 7/10/2012

Purpose:

To establish a plan for the management, retention and disposal of Community Library Network (District) records.

Public records are defined in Idaho Code 9-337 (13):” “Public Record” includes, but is not limited to, any writing containing information relating to the conduct or administration of the public’s business prepared, owned, used or retained by any state agency, independent public body corporate and political or local agency regardless of physical form or characteristic.”

District records include all documents, files, or other information in any form, that are created or received in connection with the business or activity of the District. Such records are preserved for varying periods of time to provide information concerning policies, decisions, procedures, functions, and/or other activities of the Library District.

In order to clarify which records shall be retained and for what length of time said records are to be retained, the Community Library Network (the District) defines records as permanent or ephemeral.

In this policy, the term “permanent records” is defined to mean any paper or electronic record that is created by a library staff member for immediate and/or long term use and which has long-term benefit to the institution. It is the intention of the District to dispose of permanent records only as allowed by law and when their usefulness to the District has expired.

1. *Minutes of meetings.* These records are kept indefinitely.
2. *Financial reports.* These records, including all audit records and reports are kept for the period of time prescribed by Idaho and Federal Codes and are shredded after that time period.
3. *Policies.* These records are kept indefinitely, but are updated periodically. After Board approval of the update, the older version may be discarded.
4. *Reports to the Board.* These records are kept for two years or until their usefulness to the District has expired.

5. *Other Board-related documents.* These records which include bids, architectural reports and other professional reports are kept for two years or until their usefulness to the District has expired.

In this policy, the term “ephemeral records” is defined to mean any paper or electronic record that is created by a library staff member for immediate use and which has no long-term benefit to the institution. It is the intention of the District to dispose of ephemeral records as soon as their usefulness to the District has expired, generally within two years.

1. *Records that have a patron name linked to an item from the library collection.*
These are not public records and need to be shredded as soon as the use for which they were created is completed.
2. *Records with a patron name, but not linked to an item, with or without other information such as name and address.*
These are public records, but should be destroyed as soon as their usefulness to the District has expired.
3. *Notes, slips of paper with library information from phone calls, casual notes taken by employees.*
These are public records, but should be destroyed as soon as the use for which they were created is completed.
4. *Email.*
All email messages created or received by library staff on library computers through library accounts are public records regardless of the content or sender/receiver.
All email messages and the information transmitted by, received from, and stored in the library systems are the property of the Community Library Network and should be destroyed as soon as their usefulness to the District has expired.

Any public record which is saved, for any reason, is available to the public upon request per Idaho Code 9-338 - Right to Examine -(1): “Every person has a right to examine and take a copy of any public record of this state and there is a presumption that all public records in Idaho are open at all reasonable times for inspection except as otherwise expressly provided by statute.” Other than the limitations imposed by Idaho Code on copying and printing, the public has the right to request any public record, in any format, for any reason.