

Town of Beaverlodge Library Board Policies

Policy Name	Records Retention and Schedule
Policy Number	11
Legislative Authority	<i>Freedom of Information and Protection of Privacy Act</i>

Purpose To keep orderly and timely records of the Beaverlodge Public Library business in compliance with the *Income Tax Act* of Canada, the *Freedom of Information and Protection of Privacy Act*, and with the operational needs of the Library.

Definitions Library means Beaverlodge Public Library.
Library Board means Town of Beaverlodge Public Library Board

- Policy**
1. The Library retains and disposes of records as outlined in the following schedule (See Appendix A). This schedule defines:
 - 1.1 The retention period for records:
 - a. Specified for a number of years, or
 - b. **P**ermanent: the original record shall be preserved and never destroyed.
 - 1.2 The action:
 - a. **H**ard copy: the original document shall be retained for the specific period.
 - b. **E**lectronic copy: an electronic copy of the document shall be retained for the specific period.
 - c. **D**estroyed: the record shall be destroyed after the retention period.
 2. The Library Manager:
 - 2.1 Is given authority by the Library Board for the destruction of the records in accordance with the schedule.
 - 2.2 Is responsible for the proper and complete destruction of the records disposed of under this policy.
 - 2.3 Has the discretion to retain records longer than the period provided for in this policy. Will not destroy records while there is a FOIP request or related court action in progress.
 3. Permanent records are stored at the Library in appropriate secure storage.

Original Effective Date:	September 19, 2018	Chairperson's Signature	Chairperson's Name Jini Palmer
Review Due Date:	September 2020		

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Appendix A Records Retention Schedule

Record Description	Retention Period in Years	Action
	P = Permanent De = Destroy H = Hard Copy E = Electronic	
Administration – General Includes records on general administration	2	De
Annual Reports – Beaverlodge Public Library	P	H
Annual Reports – Local Boards Reports from other Boards such as Peace Library System	3	De
Board Minutes	P	H
Board Packages	5	De
Building Records relating to the planning and construction of the facility, including any architectural drawings	P	H
Contracts & Agreements Records relating to persons, firms or corporations with whom Beaverlodge Public Library has entered into some form of contract or agreement	Retain 3 years after expiration of contract and/or warranty	De
Correspondence – Electronic and Hard Copy Includes incoming or outgoing correspondence as deemed necessary for library operations	3	Selective Retention or De
Finance – Accounts Payable Records of payment made to vendors providing service to GPPL. Includes invoices and supporting documentation	7	De
Finance – Accounts Receivable Control and operation of receivable accounts such as invoices, statements and supporting documentation. Documentation may be in hard copy or electronic format	7	De
Finance – Audits Annual audited financial statements, including statement, recommendations and background documentation	P	H

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Record Description	Retention Period in Years	Action
	P = Permanent De = Destroy H = Hard Copy E = Electronic	
Finance – Banking Administration of banking methods and establishment, maintenance and termination of banking arrangements	P Retain for one year after termination of relationship with financial institution	H
Finance – Banking Records of deposits, cheques, petty cash, statements and reconciliation	7	De
Finance – Budgets Includes records pertaining to the preparation of budgets	7	De
Finance – Grant Applications Original grant submissions, supporting documentation and final reporting documents	7	De
Finance – Investments	Until superceded	De
Finance – Taxation Taxation matters at all government levels and records pertaining to GST, customs and excise taxes, annual reports and supporting documentation	7	De
Insurance Includes policies, claims and any other related documentation	Retain current only	De
Legal Matters Records relating to legal issues, opinions and advice provided to the Board by a solicitor	P	H
Marketing / Promotional Materials Newsletters and other publications produced to advertise library programs and promote the library as appropriate	P	H, E
Personnel – Applications & Resumes (interviewed but not hired) Includes applications and resumes of people interviewed but not hired for vacant positions, including notes of interviewers	1	De
Personnel – Applications & Resumes (not interviewed and not hired)	Not retained	De

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	P = Permanent De = Destroy H = Hard Copy E = Electronic	
Includes application and resumes of people interviewed and not hired		
Personnel – General (former staff) Includes the personnel records of individual employees, personal data, resumes, employment history, time sheets, performance appraisals, pay and benefits, training, commendations etc.	7	H, E then De
Photographs Includes photographs deemed of historical interest	P	H, E
Policies and By-laws	Retain until superceded	De
Staff meetings Includes minutes of meetings of departments, all staff and other groups	3	De
User Records	3 yrs after last confirmed address check	De
User Records – In Collection Agency or owing more than \$100.00	6 years	De