



## **Records Retention Policy**

The *Records Retention and Disposition Schedule MI-1* published by the University of the State of New York and the State Education Department indicates the minimum length of time that local government entities must retain records before they may be disposed of legally. The Board adopted this schedule on Feb 14, 1989. The current schedule is on file in the office of the Library Director. The following sections are most pertinent to the library: Library/Library System, Fiscal and Personnel/Civil Service.

The Library Director shall serve as the Records Management Officer for the Library in order to ensure compliance with the aforementioned *Records Retention and Disposition Schedule*.

The Library Director shall also serve as the Records Access Officer for the Library in order to ensure compliance with the *Freedom of Information Law*.

The following list shows the retention period of specific records:

### **Permanent:**

Annual Financial Report to the State

Annual Reports of Library Statistics

Audits

Board of Trustee Minutes, By-Laws

Budgets

Building Specifications and Plans

Checks (for important payments and purchases)

Civil Service exam records, appointment records

Contracts, mortgages, notes, and leases (still in effect)

Correspondence (legal and important matters)

Deeds, mortgages, and bills of sale

Incorporation, chartering, and registration records

Insurance records, accident reports, claims, policies, etc

Library history files

Payroll records

Payroll tax records

Personnel file (master summary record, dates of employment, title, Civil Service status)

Retirement and pension records

Tax returns

W-2 forms

Year-end financial statements

**Non-Permanent**

**Retention**

Accession records	1 year
Accounts payable ledgers and schedules	7 years
Bank reconciliations	2 years
Bank statements	3 years
Bids – successful	15 years after completion
Bids – unsuccessful	4 years
Contracts, mortgages, notes and leases (expires)	7 years
Correspondence (general)	2 years
Correspondence (vendor and customer)	2 years
Directory of public library system and member libraries	Current
Duplicate deposit slips	2 years
Employee injury record	18 years
Employment applications	3 years
Individual title purchase requisition	1 year
Insurance policies (expired)	3 years
Internal audit reports	3 years
Inventories of products, materials, and supplies	7 years
Invoices	7 years
Library material censorship and complaint records	6 years
Payroll records and summaries	7 years
Personnel files (terminated)	7 years
Records documenting material selection	0 after no longer needed
Toxic substance exposure report	30 years
Unemployment insurance records	6 years