

RECORD RETENTION SCHEDULE

Records Retained in Perpetuity

- Audit reports
- Bylaws
- Historical files
- Library district charter
- Real estate records including leases

Records Retained for Ten Years

- Annual financial reports
- Annual state library report
- Benefits records
- Bond records
- Budget resolutions
- Building specifications and plans
- Board of Trustees agendas, packets and minutes
- Financial records, budgets, etc.
- Grant documentation, including e-rate
- Litigation files
- Personnel files
- Policies
- Public Employees Retirement System of Idaho reports
- Requests for legal services

Records Retained for Five Years

- Accident and incident reports
- Contracts, memorandums of understanding, and agreements
- Grants documents and awards
- Insurance policies
- Maintenance records
- Payroll and direct deposit records
- Purchase records
- Receipts, bills and invoices
- Requests for proposals and requests for qualifications documents
- Strategic plans and other planning records
- Timesheets

- Vehicle purchase records
- W-2 and W-4 forms
- Workers compensation records

Records Retained for Two Years

- Financial statements and deposit receipts
- Employee schedules
- Expenditure reports and budget tracking documents
- Gifts and contributions
- Leave balance reports after employee separation
- Patron records
- Patron purchase suggestions
- Patron requests for reconsideration of library materials
- Program planning documents
- Purchase orders
- Recruitment files -including postings
- Travel records
- Vendor certificates of insurance
- Unemployment claim records

Records Retained Only While Actively in Use

- Audio and video recordings produced by the library
- Program plans and records
- Calendars
- Collection inventories and lists
- Email correspondence
- Employee notes
- Forms, applications and templates
- Grant applications not awarded
- Job descriptions
- Library procedures
- Personnel performance notes
- Presentation materials
- Press releases
- Postage records
- Public complaints or suggestions
- Public records requests

- Signs, fliers and other promotional materials
- Social media posts and comments
- Staff meeting agendas and minutes
- Surveillance camera footage
- Surveys
- Time off requests
- Training records
- Text messages
- Voicemail messages
- Volunteer records