



Review Date: March 2023

**Town of Manning Library Board  
Records Management, Retention Policy and Schedule Policy**

The Town of Manning Library Board (hereafter referred to as the Board) recognizes the need to maintain adequate records pertaining to the operations in the Manning Municipal Library (hereafter referred to as the Library) and to ensure the correct retention, storage and purging of said records.

**Records Management**

- 1) The Library Manager will maintain adequate records to compile monthly and annual activity reports. The storage of files is to be kept to the legal minimum consistent with the efficient operation of the library and the preservation of a meaningful historical record of Library. Where records are deemed to be vital, the confidentiality or security of the files and the implications of their possible loss or destruction should be taken into account when making the decision as to where to store them.
- 2) With the exception of those materials obtained or documented for the express purpose of public use, the records of the library are confidential and may be accessed only with the permission of the board.
- 3) Individual employee files pertaining to payroll and employment status will be maintained by the Town of Manning, all other employee files will be maintained by the Library Manager.
- 4) User records are confidential unless subpoenaed by law.

**Retaining Procedures**

- 5) The Library Manager will determine the best method of retaining the necessary records of the library. This procedure will address the following issues:
  - a) Redundancy
  - b) Importance (or lack thereof)
  - c) Age
    - Only those records which fall within the criteria for “necessary Records” will be retained. “Necessary Records” require listing and date for discard.
    - The storage of files is to be kept to the legal minimum, consistent with the efficient operation of the library and the preservation of a meaningful historical record to the Library.

**Discard procedures**

- 6) Administrative files shall be purged annually and records moved, archived or destroyed as appropriate.

- a) Regular garbage disposal (wastebasket) for documents that do not contain personal or sensitive information
  - b) Shredding or tearing into small pieces and disposing into more than one garbage container all personal and sensitive documents that are no longer deemed "Necessary Records."
- 7) The Library Manager will ensure that this method is carried out.
  - 8) The Library Manager will present all requests for access for the Library's confidential records to the Board together with any comments or recommendations.

### **Storage of Records**

- 9) Essential records of the Library shall be backed-up on a virtual storage platform, such as Dropbox.
- 10) The following are deemed to be essential records and as such shall be kept for a minimum of seven (7) years:
  - a) Board minutes
  - b) By-laws of the Library
  - c) Current contracts and service / maintenance agreements
  - d) Database of books held in Manning Municipal Library
  - e) Deed to and survey of the property
  - f) Current employee records
  - g) Financial statements and other financial records
  - h) Insurance policies
  - i) Inventory of furniture and other assets
  - j) Membership agreements that form the library
  - k) Policy and Procedure Manual
  - l) Blueprints
- 11) Other documents are maintained in administrative or employee work areas.

### **Purging of Records**

- 12) Administrative Files shall be purged annually and records moved, archived or destroyed as appropriate.
  - a) The following records shall be retained for ten (10) years after expiry of termination:
    - Accident / incident reports
    - Contracts and legal agreements
  - b) The following shall be retained for five (5) years after the year to which they relate:
    - Non-essential financial records
    - Archived correspondence
    - Member library files
    - Non-essential administrative files, correspondence and records.

- c) Staff is responsible for the maintenance of their own working files. Any “Necessary or Significant Records” received by any member of the staff shall be retained as administrative or essential files, with copies only in working files.

**Computer Backup**

- 13) There shall be a back-up of the Library administrative computers once a week. Efforts will be made to keep a digital copy of all essential records in secure off-site storage, or on a virtual storage platform (such a Dropbox, Google Drive, etc.) whose access shall be controlled by the library manager.

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Date Approved

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Board Chair Signature