



Meridian Library District RECORD RETENTION POLICY

PURPOSE

The Meridian Library District is a publicly funded entity and as such considers all information created by staff in physical or digital form to be a public record that may be subject to disclosure as governed by Idaho Code. This Record Retention Policy & schedule identifies the practice of preserving library records to ensure that citizens have access to public documents while at the same time preserving the efficiency and productivity of Meridian Library District operations.

This policy is intended to provide guidance to Trustees and library staff regarding the retention of essential and non-essential documents related to the history, business and operations of the Library. Meridian Library District's records include information that is retained for a variety of purposes. Pursuant to the exemptions Idaho Code §74-104 through §74-112, identifying information about patrons may be exempt from disclosure. Legal counsel is advised in such matters. A complete index of official records is provided in the Library's Record Retention Schedule. The Record Retention Schedule is a master plan for records storage and ultimate disposal. Each line item in the Records Retention Schedule identifies the retention policy for a particular records series. Active records are to be kept in accessible storage or electronically during their useful life. Inactive records are to be destroyed according to the record retention schedule.

The policy and schedule will be reviewed regularly by the Library Board of Trustees.

RESPONSIBILITIES AND RECORD TYPES

The District's records are retained in both paper and electronic format and stored on-site at library locations and on servers, respectively. Routine backups are performed on servers to local and cloud storage mediums. Retention of electronic records is ever-changing and certain vital records will be archived in electronic format because it is the only way to retain it in a searchable format. Other electronic records will be promptly eliminated because they serve no durable purpose.

*Adopted by the Meridian Library Board of Trustees 02/21/2018
Revised and Board Approved on 01/19/2024*

The Library Director serves as custodian of the records of Meridian Library District. The alternative for contingencies shall be the Assistant Director.

The types of records included in the Record Retention Schedule are:

- Accounting, Budget, & Finance Records
- Administrative Records
- Board of Trustee & Election Records
- Information Systems/Technology Records
- Insurance, Risk Management, & Safety Records
- Legal records
- Library Records
- Personnel & Payroll Records

Meridian Library District's records are classified into one of the following categories:

- Vital/Historical or Archival Records are irreplaceable and do not have the same value as the original when reproduced,
- Important Records could be reproduced after considerable delay and at substantial expense; records have specific regulatory statutes of limitations.
- Useful Records would cause inconvenience if lost, but could readily be replaced; records are retained in either active or inactive storage to aid office staff in tracking events, transactions, decisions, etc. in the normal process of business.
- Non-essential Records have been previously determined by Retention Schedules to be eligible for destruction.

Idaho Code does not clearly define the retention requirement for most records. The law classifies records as permanent, semi-permanent, or temporary. Permanent records are to be kept for not less than ten (10) years after creation. Semi-permanent records must be kept for five (5) years after creation or completion of the matter for which the record is held. Temporary records do not have a specified period, but usually less than five (5) years. Temporary records that are subject to audit or are not related to permanent records can be disposed of per approved retention schedules.

1. "Permanent records" shall consist of:

- a. Adopted meeting minutes of the board of trustees;
- b. Resolutions;
- c. Building plans and specifications for commercial projects and government buildings;
- d. Fiscal year-end financial reports;
- e. Records affecting the title to real property or liens thereon;
- f. Election records, including declarations of candidacy, declarations of intent, and notices of election;

g. Other documents or records as may be deemed of permanent nature by the District.

Permanent records shall be retained by the District in perpetuity.

2. "Semi-permanent records" shall consist of:

- a. Payments, canceled checks, purchase orders, payable vouchers, receipts, utility, and other financial records;
- b. Contracts;
- c. Departmental reports;
- d. Bond records; and
- e. Other documents or records as may be deemed of semi-permanent nature by the District.

Semi-permanent records shall be kept for not less than five (5) years after the date of issuance or completion of the matter contained within the record.

3. "Temporary records" shall consist of:

- a. Cash receipts subject to audit;
- b. Other documents or records as may be deemed of temporary nature by the District.

Temporary records may be retained for less than two (2) years, but in no event shall financial records be destroyed until completion of the library's annual independent financial audit.

Semi-permanent and temporary records may be disposed of under the direction and supervision of the Records Custodian only if the full retention period was met. Disposal of records outside of the authorized schedule requires approval by the board of trustees.

The following value assessments determine the records storage and management needs:

- Administrative Value
- Policy value
- Fiscal Value
- Legal Value
- Historical Value

REQUESTING RECORDS

*Adopted by the Meridian Library Board of Trustees 02/21/2018
Revised and Board Approved on 01/19/2024*

The Idaho Public Records Law grants every person, during regular office hours, the right to copy and examine any public record of the state except as otherwise provided by law. A 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 or local agency regardless of physical form or characteristic. The District's [Access to Public Records Policy](#) and request form details the process for citizens to request access to library records.