



Records Retention Policy

Section: Administration

Approved: 3/19/2009
Reviewed: 3/17/2011
Revised: 4/19/2012, 10/24/2013, 3/17/2016, 3/28/2019

Library records consist of information documented in performance of the Library's official business. The Records Retention Policy exists in order to:

- provide appropriate records to staff and the public;
- comply with laws on privacy, confidentiality, and open records;
- conform to the City's policy;
- address security and space concerns; and
- ensure that the library keeps necessary records.

Library records must be routinely maintained for legally accountable periods of time and routinely destroyed under the scheduled record retention periods.

The records retention schedule is applicable without regard to the format of a record. Certain records may be maintained in one or more formats and, at certain times, library staff may be in the process of transferring records from one format to another.

Electronic records that are deleted in accordance with the appropriate record series retention schedule may be stored on library backup servers for a period before they are completely unrecoverable. Recoverable deleted electronic records may be accessed only with permission of the Library Director. However, electronic records cannot be destroyed if they have been requested under *Code of Iowa Chapter 22*, or if they are part of ongoing litigation, even if their retention period has expired.

Responsibility

The Records Manager for the City of Ames is the City Clerk. Compliance with Library policy and implementation of public record law is the responsibility of the Library Director. Members of staff and volunteers may be appointed to assist in records management.

Schedule

A. ADMINISTRATIVE

Record Title	Retention Period	Reason
Agreements, Leases, and Contracts for Equipment or Services	Permanent	Continuing administrative value
Borrowers' accounts and database files CONFIDENTIAL	Purge after 3 years of patron inactivity, unless debts are outstanding	Administrative value ends (per State Library)
Contract and Project Administration Files	5 years after project completion	Administrative and legal value ends
Key Log	Permanent, updated, as	Continuing administrative value

	necessary, for life of locks	
Log of Public Information Requests & Responses	5 years, unless required because of pending litigation	Administrative and legal value ends
Reports and Studies	Permanent	Continuing administrative and historical value, possible legal value
Statements of Concern	5 years after resolution of the concern	Administrative value ends

B. BUILDING/EQUIPMENT

Record Title	Retention Period	Reason
Capital Projects (building plans and specifications, construction documents, blueprints, and as-built or photographic documentation)	Permanent	Continuing administrative and historical value
Fixed equipment (operating manuals, inspection logs, maintenance records, operating permits)	Life of equipment plus 5 years	Administrative value ends

C. FINANCIAL

Record Title	Retention Period	Reason
Bequests and Endowments	Permanent	Continuing administrative, historical, and legal value
Grants	Permanent	Continuing administrative and historical value
Requests for bids or proposals, responses, and evaluation materials, if not handled by City of Ames Purchasing Division	5 years after date of award	Administrative and legal value ends

D. HISTORICAL

Record Title	Retention Period	Reason
Ames Library Association Minutes, Records & Correspondence	Permanent	Continuing historical value

E. LIBRARY BOARD OF TRUSTEES

Record Title	Retention Period	Reason
Audio recordings of open meetings	1 year from date of meeting	Administrative value ends
Audio recordings of closed sessions CONFIDENTIAL	1 year from date of meeting, unless litigation is pending	Code of Iowa §21.5(4) (2009)
Board meeting packets (agenda, action forms, reports and	5 years; appraise for permanent retention	Administrative value ends

correspondence distributed for Board meetings)		
Correspondence	3 years	Administrative value ends
Library Policies	Permanent	Continuing administrative, historical and legal values
Long Range Plans	Permanent	Continuing historical value
Minutes of closed sessions CONFIDENTIAL	1 year from date of meeting, unless litigation is pending	Code of Iowa §21.5(4) (2009)
Minutes of open meetings	Permanent	Continuing administrative, historical, and legal values
Signed Resolutions	Permanent	Continuing administrative, historical, and legal values

F. PERSONNEL

Record Title	Retention Period	Reason
Applications for temporary positions	6 months	Administrative value ends
Employee Files (application, position description at time of hire, written reprimands, performance evaluations.) CONFIDENTIAL	5 years after end of employment (Service records of permanent employees retained permanently by Human Resources; payroll information kept permanently by Finance Dept.)	Administrative value ends
Recruitment Files (search committee and interview notes) CONFIDENTIAL	5 years after position filled (Note: all electronic applications are retained by Human Resources.)	Administrative value ends

References

[Code of Iowa Section 304.2\(6\)](#)

[Code of Iowa Section 22](#)

[Record Retention Manual for Iowa Cities](#), Iowa League of Cities, October 2012

Ames Public Library's [Confidentiality and Library User Records Policy](#).