

Records Retention Policy

Approved by the Patterson Library Board of Trustees on 11/14/2024

The Director and the staff of Patterson Library are committed to maintaining documents and paperwork essential to the business and history of the Library and those required by law. Record Retention and disposal will be guided as follows:

This policy applies to all records regardless of form (i.e. electronic, email, physical, etc.)

Patterson Library is required to keep library records confidential according to **Civil Practice Laws and Rules, Section 4509**. As an Association Library, Patterson Library is not bound to **Retention and Disposition Schedule for New York Local Government Records (LGS-1)** but will make all attempts to comply.

Current LGS-1 specific to libraries is attached below.

Archives:

Prior to purging, all records of the Library are appraised for historical significance or value for collections documentation prior to disposition. Some of these records may have continuing value for historical or other research and should be retained permanently. Records retained permanently due to historic or research value are designated as "Archives."

General Guidelines:

Association Library Charter, bylaws, Annual Reports	Permanent
All records made available per the Open Meetings Law	Permanent
Employee-Related	7 years after termination of employee
Fiscal & Financial	7 years, unless the relevant fiscal policy, document or transaction it is related to requires longer.

Disposal:

At the end of the retention period, physical copies are purged via shredding as their retention period expires.

At the end of the retention period, electronic records are routinely disposed of by a process approved by CCLS Information Technology.

Library/Library System

Title	Major Revision	Previous Schedules	Schedule Item
▼ Incorporation, chartering and registration records:		CO2 340; MU1 304; ED1 165; MI1 254	591
<p>RETENTION: PERMANENT</p>			
▼ Accession records:		CO2 341; MU1 305; ED1 158; MI1 255	592
<p>RETENTION: 1 year after accessioning procedure becomes obsolete NOTES: Some libraries accession manuscripts, rare books and special collections, but not their general library holdings. In these cases, the accession records need to be retained only for the kinds of materials still accessioned.</p>			
▼ Informational copies of records prepared by and received from public library system,		CO2 342; ED1 166; MI1 256	593
<p>including but not limited to directories, minutes, budgets and reports: RETENTION: 0 after superseded or obsolete</p>			
▼ Borrowing or loaning records:	2020 (♦)	CO2 343; MU1 307; ED1 159; MI1 257	596
<p>RETENTION: 0 after no longer needed</p>			
▼ Catalog of holdings		CO2 344; MU1 308; ED1 160; MI1 258	598
<p>a: Manuscript or published catalog: RETENTION: PERMANENT</p> <p>b: Continuously updated catalog: RETENTION: 0 after superseded or obsolete</p>			

▼ Individual title purchase requisition		CO2 345; MU1 309; ED1 161; MI1 259	599
which has been filled or found to be unfillable: RETENTION: 1 year			
▼ Records documenting selection of books		CO2 346; MU1 310; ED1 162; MI1 260	600
and other library materials: RETENTION: 0 after no longer needed			
▼ Library material censorship and complaint records,		CO2 347; MU1 311; ED1 163; MI1 261	601
including evaluations by staff, patrons' complaints and record of final decision: RETENTION: 6 years after last entry NOTES: Appraise these records for historical significance prior to disposition. Some library censorship records deal with serious constitutional issues and may have value for future research.			
▼ Patron's registration		CO2 348; MU1 312; ED1 164; MI1 262	602
for use of rare, valuable or restricted non-circulating materials: RETENTION: 6 years			
▼ Directory of public library system		MU1 306	594
and member libraries, prepared by public library system (member library's copy): RETENTION: 0 after superseded or obsolete			

▼ Interlibrary loan records,	2020 (◆)		597
<p>including requests to borrow or copy materials from other libraries, receipts for materials, copy logs, accounting records, and circulation records</p> <p>a: When no copies of original materials are requested: RETENTION: 0 after no longer needed</p> <p>b: When copies of original materials are requested: RETENTION: 5 years after order is completed</p>			
▼ Library card application records:	2020 (◆)		595
<p>RETENTION: 3 years after card expires or is inactive</p>			
▼ Program and exhibit file	2020 (◆)		603
<p>documenting planning and implementation of programs, services and exhibits sponsored or co-sponsored by the library, including but not limited to photographs, sketches, worksheets, publicity, brochures, exhibit catalogs, inventory lists, loan agreements, correspondence, attendance sheets or registration forms, and parental consent forms:</p> <p>a: Parental consent records: RETENTION: 6 years, or 3 years after child attains age 18, whichever is longer NOTES: Photo release records are covered under item no. 68 in General Administration section.</p> <p>b: Attendance sheets and registration forms, when no fee is charged: RETENTION: 0 after no longer needed</p> <p>c: All other records: RETENTION: 6 years after exhibit closed or program ended NOTES: Appraise these records for historical significance or value for collections documentation prior to disposition. Some of these records may have continuing value for historical or other research and should be retained permanently. Contact the State Archives for additional advice.</p>			

“Library/Library System.” *New York State Archives*, 2020, www.archives.nysed.gov/records/local-government-record-schedule/librarylibrary-system. Accessed 16 Oct. 2024.

Acknowledgement:

Adams, Stephanie. “Retention Period for Employee Records | WNYLRC - Western New York Library Resources Council.” *Wnylrc.org*, 26 July 2022, wnylrc.org/raq/retention-period-employee-records. Accessed 16 Oct. 2024.