



Record Retention and Removal Policy

1. Purpose

This policy establishes guidelines for the creation, maintenance, use, and disposition of records generated and maintained by the Livonia Public Library. The goal is to:

- **Ensure compliance:** Adhere to all applicable laws, regulations, and best practices related to recordkeeping.
- **Preserve essential information:** Maintain records necessary for the library's operations, legal and financial accountability, historical preservation, and patron services.
- **Optimize storage space:** Efficiently manage physical and electronic records to minimize storage costs and improve access.
- **Protect sensitive information:** Safeguard confidential and private information in accordance with applicable privacy laws (e.g., FERPA, HIPAA, NY State Library laws).

2. Scope

This policy applies to all records created or received by the library, including but not limited to:

- **Administrative Records:** Personnel files, budgets, contracts, legal documents, board meeting minutes, policies and procedures.
- **Patron Records:** Library cards, circulation records, patron requests, account information (with appropriate privacy safeguards).
- **Financial Records:** Invoices, purchase orders, bank statements, grant applications and reports.
- **Collection Records:** Catalog records, acquisitions records, weeding records, collection development policies.
- **Digital Records:** Emails, websites, social media posts, electronic files, databases.
- **Historical Records:** Photographs, archives, local history materials.

3. Record Creation and Maintenance

- **Record Creation:** Records shall be created and maintained in a manner that ensures their accuracy, completeness, and integrity.
- **Record Formats:** Records may be maintained in various formats, including paper, electronic, and digital.



- **Record Security:**
 - Physical records shall be stored in secure locations with controlled access.
 - Electronic records shall be protected by appropriate security measures, such as access controls, encryption, and regular backups.

4. Record Retention Schedules

- **Retention Periods:** Retention periods for different record types will vary based on legal requirements, operational needs, and historical value.
 - **Consult NYSED guidelines:** Refer to specific retention schedules provided by NYSED or other relevant authorities.
 - **Develop internal schedules:** Create and maintain internal schedules for records not covered by specific regulations.
- **Record Disposition:**
 - Records that have reached the end of their retention period may be:
 - **Destroyed:** Securely destroyed through methods such as shredding or electronic data deletion.
 - **Archived:** Transferred to a designated archive or historical society for long-term preservation.
 - Audit Records shall be kept tracking the date of type of records destroyed or archived.

5. Record Access and Use

- **Access:** Access to library records will be granted in accordance with applicable laws, regulations, and library policies.
- **Confidentiality:** Confidential information will be protected and disclosed only as permitted by law and per [library policy](#).
- **Data Privacy:** The library will comply with all applicable data privacy laws, including the New York State Freedom of Information Law (FOIL).

6. Record Management Responsibilities

- **Library Director:** Overall responsibility for the implementation and oversight of the record retention policy.
- **Staff:** All library staff are responsible for complying with this policy and ensuring the proper handling of records.

Approved by Board of Trustees: March 11, 2025