**TOWN OF GAINESVILLE PUBLIC LIBRARY, SILVER SPRINGS, NEW YORK**

**RECORDS AND DOCUMENT RETENTION POLICY**

The Town of Gainesville Public Library (“the Library”) provides a welcome destination and supports life-long learning for people of all ages. Records and documents that provide planning, decision making and operational information can assist in those decisions. The Library adopted a Records Retention Policy to establish an institutional archive to ensure staying in compliance with the laws and regulations, legal and fiscal stipulations to maintain consistent management of library records.

The Library Director shall be the administrator of the policy supervising and coordinating the retention, destruction and disposal of documents pursuant to the Document Retention Schedule as per Schedule-LGS-d from the New York State Archives. The Library Board of Trustees will be made aware when the plan is being implemented to be able to express any concerns held about a particular record or document. The Library uses a business financial service and is under the umbrella of the Town Of Gainesville therefore some records and/or copies may appear in two locations.

Type of Document Minimum Requirement Location

Accounts payable ledgers & schedules 7 years Library & Financial

Annual Reports (PLS-NYS) Permanently Library

Audit Reports Permanently Library & Financial

Bank reconciliations 2 years Financial & Town

Bank statements 3 years Financial & Town

ByLaws, Charter & Amendments Permanently Library

Checks for important payments & purchases Permanently Financial & Town

Correspondence (legal & important matters) Permanently Library

Correspondence (general, vendors) 2 years Library

Deeds, mortgages, bills of sale Permanently Library & Town

Employment applications 3 years Library

Grants information (application, etc) 6 years (after close) Library

Insurance policies 3 years Town

Insurance (accident rep.,claims) Permanently Town & Library

Inventories (products,materials,supplies) 6 years Library

Long range plans 7 years Library

Minutes Permanently Library

Payroll records 7 years Financial

Personnel files 7 years Library

Retirement, pension records Permanently Library

Timesheets 7 years Financial & Library

Year end financial statements Permanently Library & Town

Library Director and Board are responsible for the ongoing process and will oversee the destruction and disposal.

Unauthorized removal or modification of record(s) is not permitted.

Record and Document Retention shall be periodically reviewed and changed in accord to local, state and federal laws by the Director and Board and approved at the following regular Board meeting.

Adopted by the Board of Trustees: April 15, 2024