

## RECORDS RETENTION POLICY

This list is a summary of information found on the Wisconsin Public Records Board site  
[http://publicrecordsboard.wi.gov/Docs\\_by\\_cat\\_type.asp?doccatid=678&locid=165](http://publicrecordsboard.wi.gov/Docs_by_cat_type.asp?doccatid=678&locid=165)

| RDA Number                  | Item  | Retention (number refers to years if not otherwise stated) | Confidentiality |
|-----------------------------|---|--|-----------------|
| <b>Board Materials</b>      |   |  |                 |
| 001                         | Board bylaws  | until superseded   |                 |
| ADM00023                    | Library policies & procedures   | until superseded + 7                                       |                 |
| 002                         | Annual reports  | current year + 2   |                 |
|                             | Minutes & meeting materials   | Permanent  |                 |
| ADM00017                    | Strategic planning documentation  | plan completion or expiration + 6                          |                 |
| <b>Administrative Files</b> |   |  |                 |
| ADM00011                    | Transitory Correspondence (Routine requests for information that require no policy decision, special compilation or research are transitory to the sender and the recipient.) | Destroy when no longer needed                              | Confidential    |
| ADM00010                    | Business-related correspondence   | creation + 1   |                 |
| 003                         | Monetary donations  | current year + 5   | Confidential    |
| 004                         | Property donations (artwork, furniture, etc)  | As long as owned by the library + 5                        | Confidential    |
| ADM00013                    | Grant documentation   | End of grant project, or denial of grant application + 4   |                 |
| 010                         | Accident reports/claims   | date of incident + 7                                       | Confidential    |
| 005                         | Patron incident/disciplinary  | date of incident + 5                                       | Confidential    |
| ADM00022                    | Open records requests   | when response is provided + 3                              | Confidential    |
| PUR00010                    | Contract and Request for Bid /Proposal file   | expiration date + 6  |                 |
| 008/009                     | Legal Opinions & Litigation files   | while being used + 5                                       | Confidential    |
| ADM00015                    | Internal newsletters to staff   | creation + 1   |                 |
| FAC00090                    | Disaster recovery records   | event + 3  |                 |
| 002                         | Annual Reports  | current year + 2   |                 |
| ADM00001                    | Routine staff reports   | creation + 1   |                 |
| FAC00103                    | Health, Safety or Fire Code Compliance Certificates   | certification expiration + 3                               |                 |

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| <b>Financial Records</b>                     |   |  |              |
|--|---|--|--------------|
| BUD00006                                     | Annual budget   | current year + 6   |              |
| 90000004                                     | Annual financial reports/audits   | current year + 3   |              |
| 011  | Budget preparation documents  | current year + 6   |              |
| 90000002                                     | Monthly financial reports   | destroy when no longer needed  |              |
| 90000021                                     | Bills, invoices, deposit slips, purchase orders, receipts, bank statements, | current year + 6   |              |
| RISK0036                                     | Liability claim files   | date claim is settled + 11<br>(in claims involving a minor hold until minor turns 18 + 11) |              |
| 012  | Inventory and Depreciation schedules  | current year + 5   |              |
| <b>Buildings, grounds, equipment</b>         |   |  |              |
| FAC00015                                     | Blueprints, building plans, final specs                                     | life of structure  |              |
| FAC00057                                     | Physical plant inspection reports   | current year + 6   |              |
| RISK0048                                     | Material Data Safety Sheets (MSDS)  | while you have the hazardous materials + 30  |              |
| FAC00011                                     | Construction documents  | completion date + 10   |              |
| FAC00013                                     | Asbestos & hazardous materials remediation files                            | end of project + 30  |              |
| FAC00014                                     | Unsuccessful bids   | date bid is awarded + 4  |              |
| FAC00016                                     | Land titles, Conveyances and Easements                                      | Permanent  |              |
| FAC00052                                     | Building maintenance & management records                                   | current year + 3   |              |
| FAC00054                                     | Equipment installation, repair, service records                             | keep as long as you have the equipment   |              |
| FAC00060                                     | Lease and tenant information  | expiration of lease + 6  |              |
| FAC00068                                     | Chemical & pesticide use (lawn care, etc.)                                  | date of use + 3  |              |
| FAC00082                                     | Surveillance recordings   | 120 days   |              |
| RISK0025                                     | Property insurance policies   | policy effective date + 30   |              |
| FAC00055                                     | Building Maintenance/-Warranty Files  | warranty expiration + 1  |              |
| RISK0035                                     | Liability Insurance policies  | policy effective date + 75   |              |
| <b>HR/Personnel: Job Search &amp; Hiring</b> |   |  |              |
| HR000013                                     | Job application materials for non-hires                                     | date person is hired + 4   | confidential |
| HR000026                                     | Federal I-9 forms   | 3 years after date of hire or 1 year after termination, whichever is longer                | confidential |
| HR000012                                     | Job announcements/postings  | date person is hired + 4   |              |
| HR000022                                     | Unsolicited resumes and general requests about employment                   | date received + 6 months   | confidential |

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|  |  |   |              |
|--|--|---|--------------|
| HR000025   | Letters or emails to unsuccessful candidates       | end of recruitment + 1                          | confidential |
| HR000017   | Criminal Background checks                         | date report is received + 6.5                   | confidential |
| <b>HR/Personnel: Other</b>                             |  |   |              |
| HR000190   | Personnel files                                    | while person is employed by the library + 8     | confidential |
| RISK0010   | Employee injury records/Workers compensation files | while person is employed by the library + 30    | confidential |
| HR000108   | Grievances   | until resolved + 5                              |              |
| HR000045   | Job descriptions                                   | while person is employed by the library + 8     |              |
| HR000191   | Volunteer/community service files                  | while the person is working at the library + 2  | confidential |
| HR000113   | Employee discipline related records                | event + 5                                       | confidential |
| HR000192   | Employee performance evaluations                   | while person is employed by the library + 8     | confidential |
| PAY00011   | Payroll records                                    | creation + 4                                    | Confidential |
| ADM00005   | Calendars and staff scheduling documents           | creation + 1                                    |              |
| HR000157   | FMLA requests and responses                        | creation + 3                                    | confidential |
| HR000198   | Employee handbook/staff manual                     | until superseded                                |              |
| PAY00021   | Withholding forms (federal W-4, state WT-4, etc)   | while person is employed by the library + 7     | confidential |
| PAY00025   | Unemployment Compensation claims                   | creation + 5                                    | confidential |
| <b>ILS/ILL/Collection</b>                              |  |   |              |
| 016  | Patron registration/application forms              | May be destroyed once entered into the database | confidential |
| 019  | Daily, monthly, & annual statistical reports       | current year + 1                                |              |
| 020  | ILL records  | active + 30 days                                | confidential |
| 006  | Purchase suggestions                               | date decision is made + 1                       | Confidential |
| 007  | Requests for reconsideration of library materials  | date decision is made + 6                       | Confidential |
| 013 & 014  | Bibliographic & item-level records                 | may delete when item is withdrawn               |              |
| <b>Programming, Public Service, and Communications</b> |  |   |              |
| 023  | Meeting room use records                           | May be destroyed once meeting room use is over  | confidential |
| 025  | Programming & event files                          | date of event + 1                               |              |
| 027  | Press releases                                     | release date + 5                                |              |
| 026  | Contest entry forms                                | until contest is over + 30 days                 | confidential |
| ADM00024   | Surveys (customer satisfaction, etc.)              | Creation + 1                                    | possibly     |

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|              |   |  |              |
|--------------|---|--|--------------|
| 113          | Library newsletters   | current year + 3                                 |              |
| 024          | Reference requests & responses  | may be destroyed once question has been answered | confidential |
| <b>Other</b> |   |  |              |
| 023          | Internet use agreement  | while active                                     | confidential |
| 028          | Local History Files: records documenting transfer of legal and physical custody of documents, photographs, and other items in local history collections | Permanent  |              |

Social Media posts (Facebook, twitter, etc) and library web pages are considered records but are not specifically mentioned in the records retention schedule. For example, Facebook posts about upcoming activities are similar to the sort of article that can be found in library newsletters. Therefore, keep those posts as you would newsletters (current year + 3 years)

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