

Appendix A - Records Retention Schedule

Function	Records Series	Filing	Retention (years)	Notes
Board	Deed of Library Property		Permanent	
	Ministry - <i>Annual Survey of Public Libraries</i>	By year	Permanent	
	Strategic Plans	By year	Permanent	
	Annual Reports for the Library	By year	Permanent	
	Board Packages (including agendas, minutes, correspondence, reports, etc.)	By meeting date	Permanent	
	Committee Minutes	By committee	Seven (7)	
	Library Policies	By policy number	Current	
	Library Board Bylaws	By by-law number	Current	
	Contracts (e.g. Fire Hall lease, etc)	By contract	Seven (7), following end of agreement	
	Court cases pertaining to the Library	By case	Permanent	
Administration	Insurance policies, records and claims	By year	Seven (7)	
	Grant applications (successful) and responses	By year	Seven (7)	
	Banning notices	By series	Two (2)	
	Freedom of Information requests	By name	Permanent	
	Statistical reports	By year	Permanent	
	Capital assets inventory		Current	
Facility Management	Request for reconsideration of materials in collection	By year	Two (2)	
	Architects' or engineers' reports, plans, drawings	By project	Permanent	
Finance	Inspection reports (routine and special maintenance)	By type	Four (4)	
	Audited financial statements & Auditor's reports	By year	Permanent	See GOV-07 Financial Control/ Oversight
	Bequests	By series	Seven (7)	
	Bank statements	By year	Seven (7)	
	Cash records	By year	Seven (7)	
	Donation receipts (copies)	By year	Two (2)	
	Charitable returns	By year	Seven (7)	
	Deposit records	By year	Seven (7)	
	Final budgets	By year	Seven (7)	
	Paid invoices	By year	Seven (7)	
	Written Quotations/ RFP	By project	Seven (7)	See OP-18 Purchasing
Personnel	Year-end working papers	By year	Seven (7)	
	Current employee personnel files	By name	Current	
	Terminated employee personnel files	By name	Seven (7)	
	Employee WSIB claims and records	By name	Seven (7)	
	Job postings	By posting	Two (2)	
	Resumes/applications for employment – not hired	By posting	6 months	
	Pay equity/job evaluation reports and implementations documents	By year	Permanent	
	Payroll	By year	Seven (7)	
	Seniority list	By series	Current	
	Timesheets	By year	Seven (7)	
T4 summaries	By year	Seven (7)		

Function	Records Series	Filing	Retention (years)	Notes
Labour Relations	Collective Agreements	By year	Permanent	
	Grievance forms, correspondence and related documentation	By year	Permanent	
	Records relating to contract negotiations and letters of intent/understanding	By year	Permanent	
	Arbitration Awards	By year	Permanent	
Volunteers	Active volunteer files	By name	Current	
	Inactive volunteer files	By name	2, following last volunteer activity	
Library Operations	Active library patron accounts	Database	Current	Integrated Library System (ILS). OP-01 – Privacy, Access to information...
	Expired library patron accounts	Database	2, following expiry	ILS
	Loan transactions	Database	Retained as long as patron account is active, then 2 years following expiry	ILS
	Outstanding fines / lost/damaged charges	Database	Retained as long as patron account is active, then 2 years following expiry	ILS
	Overdue notices	Database	Current	ILS
	Interlibrary loan records	Database	Two (2)	INFO/VDX database
Risk Management	Incident reports	By series	Ten (10)	
	Health & safety inspection reports	By year	Four (4)	
	Health & Safety Committee meeting minutes	By year	Four (4)	