

Code	OPS-023	
Policy Title	Records Retention Policy	
Category	Operational & Facility Policies (OPS)	
Cross-Reference	GOV-008 Open Meetings and Records Policy	Page 23
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Date Adopted	January 2026	
Date Reviewed	--	

Policy Statement

The Robert R. Jones Public Library District is committed to maintaining an organized and compliant system for the retention, storage, and disposal of records. This policy ensures compliance with federal, state, and local laws, promotes operational efficiency, and safeguards sensitive information while allowing access to records necessary for library operations and accountability.

This policy applies to all records created, received, or maintained by the library, in any format including paper, electronic, and audiovisual media. It applies to all staff, volunteers, and trustees.

PROCEDURE

The library will retain records only as long as necessary to meet legal, fiscal, operational, and historical requirements. Records will be disposed of in a manner that protects confidential or sensitive information.

Records Retention Guidelines

RECORD TYPE	RETENTION PERIOD	NOTES
Board Meeting Minutes (Open Sessions)	Permanent	Archive in secure storage.
Board Meeting Minutes (Closed Sessions)	Permanent	Maintain written minutes indefinitely. Include the vote to go into closed session and cite the specific Open Meetings Act exemption. Keep verbatim audio/video records for at least 18 months; may be destroyed after approved written

		minutes and board approval. Review every six months to determine continued confidentiality.
Board Resolutions & Policies	Permanent	Maintain historical continuity.
Annual Audit Reports	Permanent	Maintain for reference and legal compliance.
Budget Documents & Financial Reports	7 years	Include supporting documentation.
Accounts Payable/Receivable & Invoices	7 years	Maintain for audit purposes.
Payroll Records & Tax Documents	7 years	Maintain per IRS and state requirements.
Personnel Records (Active)	Duration of employment	Confidential; maintained in personnel files.
Personnel Records (Inactive)	7 years after termination	Confidential; secure disposal required.
Program Records & Statistics	3–5 years	Includes registration, attendance, and evaluation data.
Correspondence (General)	3 years	Includes routine emails, letters, and memos.
Contracts & Agreements	Duration of contract + 7 years	Include amendments and renewal documents.
Grants & Funding Documentation	Duration of grant + 7 years	Maintain per funding agency requirements.
Library Catalog & Circulation Records	1 year	Patron information must comply with privacy laws.
Electronic Files & Emails	3 years	Subject to applicable retention for the type of record.

Note: Retention periods reflect current Illinois law and standard library practice and may be adjusted as legal requirements change.

Record Storage and Security

- Records shall be stored in a secure, organized manner to prevent loss, theft, or damage.
- Electronic records shall be backed up regularly and protected with appropriate security measures.
- Confidential and sensitive records must be accessible only to authorized personnel.
- Verbatim recordings of closed sessions must be maintained securely for at least 18 months after the meeting, or until the board approves destruction.

Record Disposal

- Records shall be disposed of at the end of their retention period using methods appropriate to their format and confidentiality level, including shredding paper documents and secure

deletion of electronic files.

- Disposal of confidential records, including closed-session recordings, must be documented to ensure accountability and comply with Open Meetings Act requirements.