



## BRACEBRIDGE PUBLIC LIBRARY POLICIES AND PROCEDURES

CATEGORY: Operations #2

SUBJECT: Records Retention

POLICY REPLACING: New

BOARD APPROVAL DATE: June 12, 2018

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### RATIONALE:

The Bracebridge Public Library Board recognizes the importance of organizing and retaining library records according to standards that ensure ease of retrieval while maintaining appropriate levels of security and confidentiality.

### DEFINITIONS:

**Active Record** - Record that is a document which is still actively in use. Usually referenced on a daily or monthly basis. Oftentimes, if in paper, these records will be located in their respective department filing cabinets since they are used frequently.

**Electronic Record** - Record that exists in an electronic format only (may include e-mail or electronically created records or electronic records contained in other electronic databases).

**Inactive Record** - Record which is no longer referenced on a regular basis and tends to be stored in a less accessible place since it is not used frequently. An inactive record will be deleted or destroyed when it reaches its cut-off as defined in the Records Retention Schedule.

**Permanent Record** - A record that is preserved and never destroyed.

**Record** - Means any recorded information, however recorded, whether in printed form, on film, by electronic means or otherwise.

**Records Retention** - A term referring to the time a record is to be retained from creation through to archive or destruction within government legislation, historical or evidential value.

**Total Retention** - Indicates the total length of time the record is to be kept.

**Transitory Record** - Record kept solely for convenience or reference and of limited value in documenting the planning or implementation of Library Board policy or programs, such as:

- copies of misc. notices, memoranda concerning routine administrative matters or other minor issues;
- information copies of agendas, minutes, newsletters;
- preliminary drafts of letters, memorandums, reports, notes;
- voice mail messages

### POLICY STATEMENT:



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The CEO or designate shall administer this policy and ensure that all relevant legal requirements are met.

This policy applies to all records, in all formats, created or received by the Library (including its Board and Employees) in the course of carrying out job-related responsibilities.

### **The Municipal Act, 2001**

Library boards must follow the requirements in the Municipal Act regarding the treatment of records. This includes direction that records must be retained in a secure and accessible manner, and that subject to the Municipal Freedom of Information and Protection of Privacy Act (MFIPPA), certain records must be accessible to the public. This is echoed in the Ontario Public Libraries Act.

### **Retention**

1. Bracebridge Public Library will use the Town of Bracebridge Records Retention Schedule as applicable. If necessary the Library may create their own retention schedule for records not covered by the Town.
2. In addition, other bodies to which the library must relate may have their own retention requirements (e.g. CRA requirement to maintain employment records for seven years).
3. The Library Board and/or CEO may request that some records be retained beyond their retention schedule.

### **Access**

1. Upon approval of this policy and development of accompanying procedure, all records, other than transitory records, shall be created with an appropriate file name on each numbered and dated page.
2. All requests from the public to access library records must be made in writing and authorized by the CEO or designate.
3. When appropriate, the CEO may direct the requestor to MFIPPA.
4. Library employees must refer to Access 2. above and observe the Library's standards of confidentiality and accessibility in responding to requests to examine records.

### **Protection and Storage**

1. The CEO shall ensure that records are stored in a manner that limits access to only those in charge of the records.
2. Records shall be stored in such a manner to minimize risk of loss or destruction.
3. The CEO may enter into off-site archival storage agreements if space or security limitations so demand and the municipality is in agreement.



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4. Procedures and practices with regards to electronic records will be regularly reviewed and updated as required, reflecting the changing nature of technology.

### **Disposition of Records**

1. Disposition of records that have aged beyond their retention schedule will be conducted by the holder of the records whether the municipality or the Library.
2. Review for disposition and actual disposition itself occurs on an annual basis.
3. Disposition must be handled in a fool proof and secure manner such as shredding, either on-site or at an archival facility.

Any discrepancies between this policy and the Library's communication procedures shall be addressed by the Library to ensure compliance with the policy.

### **RELATED DOCUMENTATION:**

Municipal Act, 2001 sections 253-255  
Freedom of Information and Protection of Privacy Act  
Ontario Public Libraries Act  
Confidentiality Policy

PREVIOUS REVISIONS: None

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London Public Library, SOLS Trillium Library