

SCHEDULE 6 – LIBRARY DEPARTMENT

Section 1: Library Records

6.101: ANNUAL OR OFFICIAL REPORT

These are official reports summarizing activities and accomplishments of a governmental entity or program which are produced and distributed regularly. They may include statistics, narrative reports, graphics, and diagrams.

RETENTION – Retain permanently. Records may be transferred to the archives

6.102: CIRCULATION RECORDS

These are records of all library materials checked out from the library system. They may be automated or manual systems. The information includes the item title, identification number (barcode number), date item due, patron name and library card number.

RETENTION – Retain until administrative need ends, then destroy

6.103: COMMISSION AGENDA FILES

These files document the public notification of regular and special commission meetings. The files include agenda (containing date, time location of meeting, items to be discussed) and completed forms requesting items to be included on the agenda.

RETENTION – Retain permanently

6.104: CONTRACT RECORDS

These records document contractual agreements for products or services. Records may include preliminary requirements, contractor payroll records bids, and the signed contract.

RETENTION – Retain for 10 years after expiration of contractual agreement, then destroy

6.105: CUSTOMER REQUEST OR COMPLAINTS

These records document customer complaints or requests for service received and answered by the governmental entity. Information includes requester or complainant details, description of the request or problem, and actions taken by the agency.

RETENTION – Retain for 3 years, then destroy

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6.106: EMPLOYEE AND PROGRAM PRODUCTIVITY RECORDS

Reports documenting work productivity of employees or an office. Includes weekly activity or production reports, monthly activity reports, etc.

RETENTION – Retain for 2 years, then destroy

6.107: FIXED ASSETS RECORDS

These records relate to tangible assets such as property and equipment owned by a governmental entity. Information includes substantiation, purchases, depreciation, inventories, and related records.

RETENTION – Retain for 10 years after disposition of asset, then destroy

6.108: GRANT RECORDS

These records document grants received or awarded by governmental entities, which may contain applications, notice of award, reports, correspondence, and related records.

RETENTION – Retain for 7 years after final action, then destroy

6.109: HOLDINGS CATALOG

This catalog serves as a finding aid for library users in locating library materials currently in library collection. Manual card catalogs have been replaced in many libraries with online catalogs. These catalogs are constantly being updated as materials are added and withdrawn. The information includes call number, author, title, publisher, number of copies, date and subject headings. Computer catalogs also include number and status of copies (on shelf, checked out, and date due).

RETENTION – Retain until administrative need ends, then destroy

6.110: INTERLIBRARY LOAN RECORDS

These records document the lending and borrowing of library materials through the interlibrary loan network. They include interlibrary loan forms, computer searches, related correspondence and memoranda. The interlibrary loan forms include patron's name, address, telephone number, description of material being requested (author, title, publisher, publication date), a signed statement indicating patron is willing to assume costs for borrowing material, status indication (overdue, lost, out-of-print), indication of search strategy, date material provided, and date material to be returned.

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RETENTION – Retain until final action, then destroy

6.111: LIBRARY REGISTRATION RECORDS

This registration card is completed by patrons applying for a library card. This information is used for the checkout of library materials, monitoring of overdue books, fines and fees, and for the on-going verification of address and telephone number. Some libraries issue library cards for a specified period while other library cards never expire if used on a regular basis. Non-expiring library cards normally become inactive after one year of nonuse. The card may be retained for verification purposes. The card includes patron name, home and business addresses and telephone numbers, application date, and birth date.

RETENTION – Retain for 1 year, then destroy

6.112: LOCAL GOVERNMENT ACCOUNTS PAYABLE AND RECEIVABLE RECORDS

These are records related to monies collected, paid, or invested in the conduct of business. Information may include bank records, invoices, revenue, expenses, and related accounting records. Trust records are not included.

RETENTION – Retain for 4 years, then destroy

6.113: OPEN MEETING MINUTES

Approved minutes of an open meeting are the official record of the meeting of a public body. Contained in or with the minutes shall be the substance of all matters proposed, discussed or decided and votes taken. This includes any public materials distributed at the meeting.

RETENTION – Retain permanently. Records may be transferred to the archives.

6.114: **OPEN MEETING RECORDING

Audio or video recording documenting what transpired in an open meeting of a public body and are the official record of the meeting until and unless written meeting minutes are approved. Recordings used in place of written minutes in accordance with Utah Code 52-4-203(2)(b) are meeting minutes and are subject to the general retention schedule for open meetings and public materials (GRS-109), per Utah Code 52-4-203 (6) (2018).

RETENTION – Retain for 3 years after approval of written minutes, then destroy

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6.115: OPERATIONAL PROCEDURES AND GUIDELINES

These records document actions taken to achieve objectives and implement policies through day to day operations. They govern routine business activities that do not impact the rights of an individual.

RETENTION – Retain for 2 years after superseded, then destroy.

6.116: PATRON REQUEST

These are requests by library patrons for materials currently checked out or to add new materials to the library collection. They may include library card number; patron’s name, address, telephone number, and signature; call number, author, and title of material requested; patron’s signature, and indication of material’s status (checked out, overdue, reordered, out-of-print).

RETENTION – Retain for 1 year, then destroy.

6.117: PROGRAM AND POLICY DEVELOPMENT RECORDS

These records are created by executive decision-makers to document the establishment and dissemination of agency programs, policies, and procedures. Executive decision-makers may include the Chair, Director, Chief Administrative Office, Public Information Office, Commissioner, Mayor, or other internal administrator as identified by the executive office. Related correspondence and email is included.

RETENTION – Permanent. Retain for 3 years after final action, then transfer to the archives.

6.118: PUBLICATIONS

Any record of enduring value, regardless of format or platform that is disseminated by a governmental entity for public distribution. These may include website content, printed publications, newsletters, social media posts, and similar records. See Utah Code Section 9-7-101 (7) (2017) and 9-7-208 (4) (2006).

RETENTION – Retain permanently. Transfer records to the archives.

6.119: TIMEKEEPING RECORDS

Information regarding hours worked, paid or unpaid permitted absence from work for family emergency, sickness, personal time, vacation or other reasons as outlined by policy are included in this schedule.

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RETENTION – Retain for 3 years, then destroy.

6.120: WORKING FILES

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

RETENTION – Retain until 1 year after end of project or program, then destroy.