

Records Retention Policy

Initial Effective Date	Revision Effective Date	Scheduled Revision Date
<i>When the document was created and approved</i>	<i>When the document was most recently updated and approved</i>	<i>When the document is scheduled to be reviewed</i>
Jun 11, 2026	Jun 2026	Jun 2028

Purpose

The Ponoka Jubilee Library must file and retain certain information in order to conduct business and to manage the circulation of materials. The Library will endeavour to do so, however, in such a manner as to retain and organize only what is necessary to manage its affairs.

Desired Outcomes

Whenever possible, records are retained in both electronic and print (hard copy) format. Transitory documents, emails, or files may be destroyed when they are no longer relevant or needed for reference purposes.

Definitions

- The Retention Period For Records
 - A specific number of years
 - **P** – Permanent – The original records shall be preserved and never destroyed.
 - **R** – Replaced – Documents are replaced when superseded
- The Action
 - **De** – Destroyed – The records shall be destroyed without any copy being retained.
 - **ILS** – Integrated Library System – The information is only retained in the Integrated Library System.
 - **H** – Hard Copy – The original document is retained.
 - **E** – Electronic Copy – Stored on the Network drive.
- The Manager:
 - Is given authority by the Board for the destruction of records per the schedule
 - Is responsible for the proper and complete destruction of the records disposed of under this policy
 - Has the discretion to retain records longer than the period provided for in this policy
- Permanent records are stored in an appropriate secure storage.

De – Destroyed; **P** – Permanent; **R** – Replaced

E – Electronic Copy; **H** – Hard Copy; **ILS** – Integrated Library System



Record Description	Retention Period in Years	Action
Annual Report Ponoka Jubilee Library; Statistical report to the Public Library Services Branch	P	E
Board Agendas	2	E (on website)
Board minutes (signed)	P	H
Board Packages	7	De
Building Records relating to the planning and construction of the facility, including any architectural drawings	P	H
Building Inventory a list of all furniture, equipment, art, etc. owned by the library including an item description, source, replacement cost, any warranty information	R	E
Board Oath of Confidentiality Every Board member	1 year after term	De
Contracts & Agreements Records relating to persons, firms or corporations with whom PJJ has entered into some form of contract or agreement	R 3 years after expiration of contract and/or warranty	De
Finance – Accounts Payable Records of payment made to vendors providing service to PJJ. Includes invoices and supporting documentation	7	De
Finance – Accounts Receivable Control and operation of receivable accounts such as invoices, statements and supporting documentation. Documentation may be in hard copy or electronic format	7	De
Finance – Audits Annual audited financial statements, including statement, recommendations and background documentation	P	H

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Finance – Banking Administration of banking methods and establishment, maintenance and termination of banking arrangements	P (Retain for one year after termination of relationship with a financial institution)	H
Finance – Banking Records of deposits, cheques, petty cash, statements and reconciliation	7	De
Finance – Budgets Includes records pertaining to the preparation of budgets, operating grants and requests	7	De
Finance – Charitable Tax Receipts Receipts issued for monetary donations to PJJ	7	De
Finance – Grant Applications Original grant submissions, supporting documentation and final reporting documents	7	De
Finance – Investments	R	De
Finance – Taxation Taxation matters at all government levels and records pertaining to GST, customs and excise taxes, annual reports and supporting documentation	7	De
Incident Reports Information related to identification, investigation, and reporting of employee, volunteer, and patron incidents and concerns.	2	De
Insurance Includes policies, claims and any other related documentation	R	De
Legal Matters Records relating to legal issues, opinions and advice provided to the Board by a solicitor	P	H
Library Statistics Statistics kept outside of those necessary for the Annual Report, including social media, non-catalogued item loaning, etc.	5	De
Marketing / Promotional Materials Newsletters and other publications are produced to advertise library programs and promote the library as appropriate.	5 Selected materials may be retained permanently	E

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Patron Information Includes patron registration, program registration and attendance, contest, or other decision-making information as defined in Privacy Management Program	1	De
Personnel – Applications & Resumes Includes all applications and resumes received for vacant positions and, if applicable, interview notes and references collected.	1	De
Personnel – Contract Services Auditor, Book Keeper, Janitorial, etc.	3	De
Personnel – Unsolicited Applications & Resumes Includes application and resumes of people not interviewed or hired	1	De
Personnel – General (former staff) Includes the personnel records of individual employees, personal data, resumes, employment history, time sheets, performance appraisals, pay and benefits, training, commendations etc.	3	H, E then De
Privacy Impact Assessment As outlined in the library's Protection Management Plan.	6	H, E then De
Photographs Includes photographs deemed of historical interest	P	H,E
Plans of Service Strategic plan document is required by the PLSB and updated at least every 5 years.	P	H,E
Policies and By-laws	R	De
Room Rental Agreements	1	De
Staff meetings Includes minutes of meetings of departments, all staff and other groups	P	E
Volunteer Information Applications, waiver/ oath of confidentiality, criminal record check	3	De
Waiver Forms Signed by parents	10	De

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