

Document Retention and Destruction Policy

Reading Public Library
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Table of Contents

Document Retention and Destruction Policy 1

Policy 1

Reading Public Library Document Retention Schedule 2

Accounting and Finance 2

Circulation 2

Contributions/Gifts/Grants 2

Corporate and Exemption 2

Correspondence and Internal Memoranda 3

Electronic Mail (E-mail) 3

Electronically Stored Documents 3

Employment, Personnel, and Pension 3

Insurance 3

Legal and Contracts 4

Management and Miscellaneous 4

Property – Real, Personal, and Intellectual 4

Tax 4

Policy

The purpose of this policy is to provide a guideline for staff members regarding the retention and destruction of library documents and records.

Documents that should be retained and the period of retention are listed on the following attachment. In general, only documents that are not subject to a retention requirement should only be kept long enough to accomplish the task for which they were generated.

No paper or electronic documents will be destroyed or deleted that are pertinent to any ongoing or anticipated litigation.

Documents requiring destruction should be destroyed on site by shredding or by a licensed, NAID AAA Certified document destruction contractor. A Certificate of Destruction will be required as a record for compliance.

Reading Public Library Document Retention Schedule

Accounting and Finance

Document Type	Retention Period
Accounts Payable & Receivables	7 years
Annual Financial Statements & Audit Reports	Permanent
Bank Statements, Reconciliations and Deposit Slips	7 years
Employee/Business Expense Reports	7 years
General Ledger	Permanent
Interim Financial Statements	7 years

Circulation

Document Type	Retention Period
Electronic Patron Records	Delete after 7 years of non-use
Library Card Applications	Shred 3 years after expiration .
Interlibrary Loan Requests (Library card numbers only)	Deletion after 3 months
Visitor Sign-in sheet (Main Library)	Shred daily
Sign in Sheets (Programs, Events, & Classes)	One year
Summer Reading (Adults, Teens & Children)	Entries will be shredded in September following end of annual SRP.
Incident Reports / Problems / Patron Bans	2 years after resolution of the issue, filed in Admin & stored at Guards Desk
Lost and Found (with personal info or cash)	Create log and keep for 90days

Contributions/Gifts/Grants

Document Type	Retention Period
Contribution Records	7 years after the expiration of the contribution, subject to review by the Executive Director or a designee
Documents Evidencing Terms of Gifts	7 years after the expiration of the gift, subject to review by the Executive Director or a designee
Endowments	7 years after the expiration of the endowment, subject to review by the Executive Director or a designee
Grant Records	7 years after end of grant period

Corporate and Exemption

Document Type	Retention Period
Articles of Incorporation and amendments	Permanent
By-Laws and Amendments	Permanent
Minute Books, including Board & Committee Minutes	Permanent
Other Corporate Filings	Permanent

Document Type	Retention Period
IRS Exemption Application / Determination Letter	Permanent
State Exemption Application / Determination (if Applicable)	Permanent
Licenses and Permits	Permanent
Employer Identification (EIN) Designation	Permanent

Correspondence and Internal Memoranda

Hard copy correspondence and internal memoranda relating to a particular document otherwise addressed in this Schedule should be retained for the same period as the document in which they relate.

Document Type	Retention Period
Hard copy correspondence and internal memoranda relating to routine matters with no lasting significance	6 months
Correspondence and internal memoranda important to the library or having lasting significance	Permanent, subject to review by Executive Director or designee

Electronic Mail (E-mail)

Document Type	Retention Period
E-mails considered important to the library or of lasting significance should be printed and stored.	7 years, subject to review by Executive Director or designee
E-mails not included in the above category	6 months.

Electronically Stored Documents

Document Type	Retention Period
Electronically stored documents considered important to the library or of lasting significance should be printed and stored (unless the electronic aspect is of significance)	7 years, subject to review by Executive Director or designee
Electronically stored documents not included in the above category	1 year

Employment, Personnel, and Pension

Document Type	Retention Period
Personnel Records	7 years after employment ends
Employee Contracts	7 years after termination
Retirement and Pension records	Permanent

Insurance

Document Type	Retention Period
Property, D&O, Worker's Compensation and General Liability Insurance Policies	Permanent
Insurance Claims Records	Permanent

Legal and Contracts

Document Type	Retention Period
Contracts, related correspondence and other supporting documentation	7 years after termination
Legal Correspondence	Permanent

Management and Miscellaneous

Document Type	Retention Period
Strategic Plans	7 years after expiration
Emergency Handbook	6 year after replacement
Policies and Procedures Manual	Current version w/ revision history

Property – Real, Personal, and Intellectual

Document Type	Retention Period
Property Deeds and purchase / Sale Agreements	Permanent
Property Tax	Permanent
Real Property Leases	Permanent
Personal Property Leases	10 years after termination

Tax

Document Type	Retention Period
Tax exemption documents & correspondence	Permanent
IRS Rulings	Permanent
Annual information returns - Federal & State	Permanent
Tax Returns	Permanent