



Document Retention Policy

Purpose

The purpose of this policy is to establish a systematic approach for managing, retaining, and disposing of records created or maintained by the Lyons Public Library. Proper records management ensures compliance with New York State regulations, supports transparency, and preserves essential information for library operations and historical purposes.

Authority

This policy is based on the *New York State Archives' Retention and Disposition Schedule for New York Local Government Records (LGS-1)*, which authorizes the minimum retention periods for public records. The Lyons Public Library adopts and follows the LGS-1 schedule as issued and updated by the New York State Archives.

Scope

This policy applies to all records, regardless of format, created, received, or maintained by the Lyons Public Library, including physical and electronic documents, emails, reports, minutes, and other materials related to library operations.

General Record Categories and Retention

The following table summarizes common records maintained by public libraries and their minimum retention requirements as established by the LGS-1 schedule. The listed retention periods represent minimum requirements; the Library may retain records longer if operationally necessary.

Record Type	Examples	Minimum Retention Period
Administrative Records	Policies, annual reports, organizational charts, strategic plans	6 years after superseded or obsolete
Board of Trustees Records	Meeting agendas, minutes, resolutions, bylaws	Permanent
Financial Records	Budgets, annual financial reports, claims, invoices, purchase orders	6 years
Audit Records	Audit reports and working papers	6 years
Payroll and Personnel Records	Employee applications, time sheets, leave records, evaluations	6 years after termination
Library User Records	Borrower registration, circulation logs (non-identifiable data only)	Until obsolete or no longer needed
Building and Property Records	Maintenance logs, warranties, leases, blueprints	6 years after disposal or expiration
Contracts and Agreements	Vendor contracts, service agreements	6 years after expiration

Program and Publicity Files	Program flyers, publicity materials, photographs, press releases	6 years; historically significant materials may be retained permanently
Statistical and Planning Data	Usage statistics, surveys, planning studies	6 years
Grant Files	Applications, correspondence, reports	6 years after completion or denial

Other Records

Any records not specifically listed above will be managed and retained according to the relevant category within the *LGS-1 Retention and Disposition Schedule*. The Library Director is responsible for ensuring the schedule is followed and updated when revised by the New York State Archives.

Disposition of Records

When records reach the end of their required retention period and are no longer needed, they may be destroyed following proper authorization. Records containing confidential or personally identifiable information must be securely destroyed (e.g., shredding or secure digital deletion).

Responsibility

The Library Director or designee oversees the implementation of this policy, ensures staff compliance, and maintains documentation of records disposition activities.

Adopted: October 21, 2025