

**Patron Records may include:**

- Electronically stored information in the Library's ILS database.
- Legal name, address, phone number, date of birth, parent or guardian name, email address and membership type. Gender identity is optional and is left to patron discretion.
- Program/participant list may contain name, age, phone number, and membership number.
- Reference question forms may contain patron's membership number.
- Interlibrary loan materials may contain the last 4 digits of the patron's phone number.

**2.4. Record Retention & Destruction****Created** 11/08**Revised** 03/17**Guidelines and Procedures**

The purpose of this policy is to ensure that necessary records and documents are adequately protected and maintained. The Library Manager will maintain adequate records to compile monthly and annual reports to comply with federal rules, regulations and provincial legislation including:

- The Income Tax Act of Canada
- Province of Alberta Freedom of Information and Protection of Privacy Act (FOIP)

The Gibbons Public Board will retain the library records based on the schedule outlined in the Record Retention and Destruction Policy 2.4

**A) Retention of Library Records**

Permanent library records will be stored in the library office at the Library and at the Town office as outlined in the Record Retention Schedule. Board Documents should be digitally backed up monthly to the **Library Manager's cloud storage account** and physically stored in a designated Board Documents folder. Older hardcopy documents may be moved into bankers' boxes for further storage. All documents moved into boxes should be properly labeled and secured.

**B) Disposition of Library Records**

Following the time guidelines outlined in policy, the Library Manager shall compile a list of Library records which have been selected for disposal. The list of records for disposal shall be given to the Board. The Board shall call for a motion for the destruction of the records at the next regularly scheduled Board meeting.

The Library Manager will be responsible for the proper and complete destruction of the records destroyed under this policy, and will, as soon as possible, report the destruction of records to the Board.

**C) Record Retention Schedule**

The types of records and their corresponding action, as set out in this schedule, include:

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| <b>Permanent Records</b><br>→ Keep                       | The original records shall be preserved and never destroyed. These may include hardcopy, digital, and flash drive copies. |
| <b>Replaced Records</b><br>→ Replace                     | Annual forms shall be replaced yearly or replaced after a designated amount of time.                                      |
| <b>Destroyed Records</b><br>→ Destroy/Shred<br>→ Recycle | Records shall be destroyed without any copies being retained  |

See (Appendix N) Record Retention Schedule