

X. RECORDS MANAGEMENT POLICY

The South Burlington Community Library staff will comply with the following General Record Schedules (GRS) as developed by the Vermont State Archives and Records Administration (VSARA) to provide consistency in recordkeeping by Vermont public agencies for common functions and activities.

Certain types of records (payroll, budgets, accounting statements, formal warnings, annual reports, audits, management letters, invoices, receipts, purchase orders and personnel files) will be managed by the City of South Burlington and any copies held by the Community Library will be considered reference copies.

GRS-1000.1002: Accounting Records, including correspondence, inventories, invoices, reports, worksheets and requests for funds. Retain until annual audit is complete then destroy.

GRS-1000.1102: Administrative Policy Records, including agendas, minutes, memorandums of understanding, calendars, correspondence, grant documentation, plans, reports, policies, press releases, procedures and studies conducted by the library. Retain until completed plus three years then confirm and destroy. Exceptions to this are reports, studies, plans and minutes which are kept permanently and calendars which are destroyed after year ends plus one year.

GRS-1000.1012: Budget Records, including reports and recommendations in support of and analyzing the allocation of funds. Retain until end of fiscal year plus three years.

GRS-1000.1062: Marketing Records, including advertisements, posters, contracts, contact lists, logos, marketing plans, press releases, formal promotional publications and reports. Retain until completed or superseded plus three years then destroy. Exceptions to this are contact lists which are destroyed when superseded and press releases which are retained until end of fiscal year plus one year.

GRS-1000.1103: Operational/Managerial Records, including informal agreements regarding general management and processes, minutes, calendars, performance logs, plans for day-to-day operations, procedures, reports and studies that relate to internal processes. Retain until expired, superseded or completed plus three years. Exceptions to this are calendars which are destroyed after year ends plus one year and logs that are destroyed when superseded.

GRS-1304.1103: Personnel Files, including applications, authorization for personnel action, reference sources and performance evaluations. Retain until obsolete and destroy. Exceptions to this are authorizations which are kept until superseded plus three years and performance evaluations which are kept for six years and destroyed.