

Records Retention and Personnel Files Policy

This policy outlines the internal record retention procedures for the Library Board, its Officers, and the Library Director concerning archival board information and personnel records.

Board Files:

Archival Storage:

Past officers' files, encompassing complete meeting packets (agenda, minutes, treasurer's report, director's reports), are housed in a designated area at the Library accessible to the Library Board.*

These files are permanent archives accessible to the public upon request.

- Requests for information will be addressed by the Board within 30 days of receipt or at the next Board meeting, whichever comes first.

No personnel files are to be stored in this archive.

Responsibility for Archiving:

The Board President or their designated Board member is accountable for storing and appropriately destroying board files.

In the absence of the Board President or their designee, the Library Director assumes this responsibility.

Access to Board Files:

Regular access to board files is limited to Trustee Officers.

Personnel Files:

Personnel Files Definition According to State Law:

Personnel files, as defined by Massachusetts General Law, include the employee's name, address, date of birth, job title and description, rate of pay and other compensation information, job application resumes, performance evaluations, written warnings, probationary periods, waivers, termination notices, and any other documents related to disciplinary action.

Confidentiality and Contents of Personnel Files:

Personnel files, including the director's file, are confidential and encompass contracts, evaluations, written feedback, performance documents, interview notes, attendance, payroll information, disputes, and other legal documents, as well as communications between board members or between board members and the Director.

Documents containing personnel matters must be stored exclusively in the locked cabinet in the Director's office.

Employee medical information must be maintained in separate files.

In accordance with state law, the Library and/or Board must notify employees within 10 days (best practice: written and dated notification) of any information added to their personnel record that either:

- May negatively affect the employee's qualification for employment, promotion, transfer, additional compensation
- May subject the employee to disciplinary action

Employees have the right to include a written rebuttal in their file and may not face termination for doing so.

Retention Period:

Employee personal records are retained for seven years after termination of employment**

Access to Personnel Files:

Access to personnel files is limited to Trustee Officers, acting through the Library Director or their designee.

**4-drawer file cabinet in the basement designated March 2024.

** Massachusetts General Law specifies a retention period of three years, but considering various federal references and best practices, a seven-year retention period has been adopted for employee personnel records.

Approved March 21st 2024, Whelden Memorial Library Board of Trustees