

Policy Name:	Records Retention	Policy #:	A5
Version History: Approval: January 15, 2026			

Purpose

Port Moody Public Library (PMPL) will ensure access to accurate, authentic, and reliable records in all formats, including electronic, meet legislated requirements, support the effective management and work of the library, and protect patron and staff personal information.

Scope

This policy applies to:

- Library Board members, employees, and volunteers
- All records, in all formats, created or received while carrying out library roles and employment/volunteer-related responsibilities
- All records, in all formats, created during off-site outreach or research
- All records, in all formats, documenting policy and program decisions or records that have archival or evidential importance to the library
- Patron account records and associated personal information held within the library's integrated library system

This policy does not apply to items in the library's materials collections acquired for use by the public.

Underlying Principles

- Legal Compliance – Records management practices will meet legislated requirements including the *Freedom of Information and Protection of Privacy Act (FOIPPA)*, *Public Libraries Act*, *Employment Standards Act*, *Business Practices and Consumer Protection Act (BPCPA)*, *Limitation Act*, and the *Financial Information Act*.
- Privacy Protection – Records containing personal information will be managed in accordance with the PMPL's *Privacy and Confidentiality* policy A2 and *FOIPPA* requirements. PMPL minimizes data by regularly reviewing and deleting outdated patron data.
- Accountability – PMPL maintains records to document/capture decisions, actions, and transactions that demonstrate organizational accountability.
- Efficiency – Records are retained only as long as necessary to meet operational, legal, and archival requirements.
- Security – Records are protected as important corporate assets and disposed of in a secure manner that respects confidentiality requirements.

Policy Statement

1. Responsibilities

- 1.1. The Director of Library Services or designate is responsible for the administration of PMPL's records management program in accordance with the authority delegated by the Library Board.
 - 1.2. City of Port Moody records management policies and processes may take precedence for records which are hosted by the City.
 - 1.3. All library staff will act in the management of library records in accordance with this policy and associated procedures.
 - 1.4. The Library Board authorizes the Director of Library Services to implement the approved *Records Retention Schedule*, procedures, and corporate practices required to enact the policy.
2. Records Management Practices
- 2.1. PMPL will maintain and apply records management practices and procedures which ensure that records in its custody are:
 - 2.1.1. Available and accessible to support strategic and operational business decisions and *FOIPPA* requests as described in the *Privacy and Confidentiality* policy
 - 2.1.2. Held in a systemic, cost-effective, and coordinated manner
 - 2.1.3. Secured and properly protected as important corporate assets
 - 2.1.4. Available to support the business recovery process
 - 2.1.5. Retained as active records as long as required
 - 2.1.6. Disposed of in accordance with established retention schedules.
 - 2.2. The policy, procedures, and retention schedules will meet and be consistent with legislated requirements and professional standards.
 - 2.3. PMPL will retain and will not destroy any of its records that are required to meet legislated requirements, support the effective management and work of the library, and/or record the history of the library.
 - 2.4. PMPL will dispose of and destroy all transitory records and records that are no longer required according to established retention schedules.
3. Patron Account Records
- 3.1. Minimization of Data Collection – In accordance with the *Privacy and Confidentiality* policy, the library collects personal information in patron accounts only for the purpose of providing library services.
 - 3.2. Active Account Management – Patron accounts will be set to expire three (3) years from the date of registration or last renewal. This ensures:
 - 3.2.1. Regular verification of patron identity and contact information
 - 3.2.2. Verification of Port Moody residency status for service agreements and licensing compliance
 - 3.2.3. Current emergency contact information for families with children.

- 3.3. Account Activity Status – For the purposes of this policy:
 - 3.3.1. An active account is one which has been used for borrowing or has not yet reached its membership expiration date
 - 3.3.2. An inactive account is one that has not been used for library services within the previous three (3) years
 - 3.3.3. An expired account is one that has reached its membership expiration date and has not been renewed.
 - 3.4. Retention and Deletion Schedule – Accounts with outstanding replacement costs for unreturned or damaged materials, as well as unpaid late fees, will remain active until resolved or removed in accordance with the *Records Retention Schedule*. This approach balances privacy obligations with the practical need to manage unpaid charges.
 - 3.5. (For future use)
 - 3.6. Exceptions to Deletion – Records will not be deleted if:
 - 3.6.1. A patron account is subject to a legal hold, court order, or ongoing investigation
 - 3.6.2. A patron account contains information required for pending litigation or formal complaints
 - 3.6.3. A record has been identified as having historical or archival value.
 - 3.7. Notification – PMPL will make reasonable efforts to notify patrons of:
 - 3.7.1. Pending membership expiration
 - 3.7.2. Membership expiration
 - 3.7.3. Pending account deletion.
 - 3.8. However, as outdated contact information is one of the concerns this policy is intended to address, PMPL is not required to verify contact information prior to account deletion for expired accounts.
4. Records in Electronic Format
 - 4.1. The management of electronic records is integrated into PMPL's records management program, addressing content, organization, retention, disposition, and backup.
 - 4.2. Given the changing nature of technology, procedures and practices with regards to electronic records will be regularly reviewed and updated as required.
 5. Records Retention and Disposal
 - 5.1. Transitory records, unless they have become necessary for legal purposes or as otherwise provided for by law, will not be retained.

- 5.2. Active records will not be retained beyond the retention period.
 - 5.3. Records are disposed of in accordance with the approved *Records Retention Schedule*.
 - 5.4. Records retention schedules and disposition will be consistent across all media.
 - 5.5. Where records must be retained for pending tax audits or legal issues, the retention period is only extended for the duration of audit or legal purposes.
 - 5.6. When records are reviewed for disposition, records considered historical in content may be retained.
 - 5.7. The destruction of records will be done in a secure manner, adhering to legislated confidentiality requirements.
6. Storage
 - 6.1. Inactive records will be held in a safe and secure location, accessible only by authorized employees.
7. Historical Records
 - 7.1. Historical records are maintained for a variety of reasons:
 - 7.1.1. To document the establishment of the Library Board as an entity (e.g., minutes of meetings and by-laws)
 - 7.1.2. To document PMPL's policies
 - 7.1.3. To archive key historical people, events, and milestones.
 - 7.2. When reviewing records for transfer or disposition, records designated as historical are reviewed as part of an entire file or series of files.
8. Policy Review and Updates
 - 8.1. This policy will be reviewed regularly to ensure ongoing compliance with legal requirements and best practices. Updates will be communicated to trustees, staff, and the public in a timely manner.
9. Definitions

Active Patron Account is a patron account that has been used within the library's integrated library system (ILS) within the defined activity period which has not yet reached its expiration date.

Active Records are records that are retained and required for the day-to-day business of the library.

Destruction/Destroy means to eliminate permanently (e.g., through shredding or secure data deletion) a record within a record series at the time indicated on the records retention schedule.

Disposal/Disposition means the decision regarding retention after a record is no longer considered active (i.e., archived or destroyed).

Evidential Record means a record that relates to, provides, or constitutes evidence.

Expired Patron Account is a patron account that has reached its expiration date and has not been renewed or updated by the patron.

Historical Records are key records deemed to have long-term value to the library. They are unique, irreplaceable, and merit special protection to preserve corporate memory.

Inactive Patron Account is a patron account that has not been used within the library's integrated library system (ILS) for a period of three (3) years or more.

Permanent Record means those records determined to have long-term value to the library in terms of recording its corporate, service, and cultural history. They are maintained for a variety of reasons, including the documenting of the establishment of the Library Board as an entity, its policies, key historical events and milestones, and the evolution of the library system.

Records Management means the discipline and organizational function of managing records to meet defined predetermined requirements, such as business operational needs, legislation, etc.

Records Retention Schedule means a description of what records are being managed, how long they need to be retained, and what requirements their final disposition will be based on (i.e., legal, compliance, business, operational, or historical).

Transitory Record means any record that has temporary usefulness and is not required to meet legislated requirements, set policy, establish guidelines and procedures, certify a transaction, become a receipt, or provide evidence of a legal, financial, operational, or other decisions of the library. Examples of such records include: duplicate copies, working documents, and notes from a meeting for which the reports and minutes have been finalized or adopted.