

Lynx Records Retention Policy

Approved: 9/19/2025

PURPOSE

The Lynx Library Consortium (the "Consortium") is a joint powers entity and as such considers all records maintained by the Consortium to be public records that may be subject to disclosure pursuant to the Idaho Public Records Law. While Idaho law provides that any "writing" prepared or used in the conduct of public business qualifies as a public record, it also recognizes that records vary tremendously in their utility and significance. For instance, resolutions and minutes are important for day-to-day operation and are also historically significant, and, therefore, should not be destroyed. On the other hand, many types of public records should be kept for the applicable retention period and destroyed once their utility is exhausted. Unlike with other public agencies (such as cities, counties, and highway districts), Idaho law does not specifically provide for how the Consortium records are to be classified and maintained. As such, the Consortium Board of Directors (the "Board") has established this Records Retention Policy (this "Policy"), together with the incorporated Record Retention Schedule (the "Retention Schedule"), to address how the Consortium manages its public records. This Policy is limited to issues of retention, classification, and management of public records. The Consortium's Access to Public Records Policy and request form details the process for persons to request access to Consortium's records.

DOCUMENTS WHICH CONSTITUTE A PUBLIC RECORD

The definition of "public record" is found in the Idaho Public Records Act in Idaho Code § 74-101(13):

"Public record" includes, but is not limited to, any writing containing information relating to the conduct or administration of the public's business prepared, owned, used or retained by any state agency, independent public body corporate and politic or local agency regardless of physical form or characteristics. Provided, however, that personal notes created by a public official solely for his own use shall not be a public record as long as such personal notes are not shared with any other person or entity.

Idaho Code § 74-101(18) defines "writing":

"Writing" includes, but is not limited to, handwriting, typewriting, printing, photo stating, photographing and every means of recording, including letters, words, pictures, sounds, or symbols, or combination thereof, and all papers, maps, magnetic or paper tapes, photographic films and prints, magnetic or punched cards, discs, drums or other documents.

In basic terms, the definition of public record established by Idaho law includes any recorded information, regardless of medium, that relates to the business of a public agency, unless the record is exempt from disclosure by law. Public records can be paper documents, books, maps, pictures, audio/visual recordings, microfilm or microfiche, as well as electronic documents (including computer files). E-mail and texts are considered public records and are subject to the same laws as any other public record.

All Consortium public records are property of the Consortium, and no Consortium official or staff shall have any personal or property right to such records even though he or she may have developed or compiled them. The unauthorized destruction or removal of Consortium records is prohibited.

CLASSIFICATION AND RETENTION OF RECORDS

The Consortium's records are retained in both paper and electronic format and stored on-site at Consortium locations and on servers, respectively. Routine backups are performed on servers to local and cloud storage mediums. Retention of electronic records is ever-changing and certain vital records will be archived in electronic format because it is the only way to retain such records in a searchable format. Other electronic records will be promptly eliminated because they serve no durable purpose. The following value assessments will determine the Consortium's records storage and management needs: (i) administrative value, (ii) policy value, (iii) fiscal value, (iv) legal value, and (v) historical value; provided, however, such value assessments shall not alter the record retention periods set forth in this Policy and the Retention Schedule.

The Retention Schedule provides a detailed guide for Consortium records retention and ultimate disposal. Each line item in the Retention Schedule identifies the retention policy for a particular records type. The types of records included in the Retention Schedule are:

- Accounting, Budget, Finance & Payroll Records
- Administrative Records
- Board Records
- Information Systems & Technology Records
- Insurance, Risk Management & Safety Records
- Legal Records
- Consortium Records
- Human Resources & Personnel Records

District records are to be kept and destroyed according to the Retention Schedule.

As indicated, Idaho law does not specifically provide for how Consortium records are to be classified and maintained. Nor does Idaho law define the retention requirements for Consortium records. However, Idaho Code does provide classification and retention requirements for other types of public agencies, and the Consortium considers such statutes, although non-binding as to the Consortium, to be illustrative of appropriate practices and timelines. As such, the Consortium has determined to classify its records as: (1) permanent, (2) semi-permanent, or (3) temporary, as each such category is further described below.

1. "Permanent records" shall be retained by the Consortium in perpetuity and consist of:
 1. Adopted meeting minutes of the Board;
 2. Resolutions;
 3. Specifications for Consortium projects.
 4. Fiscal year-end financial reports;
 5. the documents or records as may be deemed of permanent nature by the Consortium Board.

2. "Semi-permanent records" shall be kept for not less than five (5) years after the date of issuance or completion of the matter contained within the record and consist of:
 1. Payments, canceled checks, purchase orders, payable vouchers, receipts, utility, and other financial records;
 2. Contracts; and
 3. Departmental reports;
 4. Other documents or records as may be deemed of semi-permanent nature by the Consortium Board.
3. "Temporary records" do not have a specified period of retention and shall be kept for the applicable period set forth on the Retention Schedule; provided, however, in no event shall financial records be destroyed until completion of the Consortium's annual independent financial audit to which such records pertain. Temporary records consist of:
 1. Cash receipts subject to audit;
 2. Other documents or records as may be deemed of temporary nature by the Consortium.

DESTRUCTION OF RECORDS

The Consortium's Administrator serves as custodian of the records of the Consortium (the "Records Custodian"). The alternative for contingencies shall be the Board Chair.

Permanent Records shall not be destroyed. Semi-permanent records and temporary records may be disposed of by resolution of the Consortium Board only if the full retention period was met. Disposal of records outside of the authorized Retention Schedule requires approval by the Board. The resolution ordering destruction shall list in detail records to be destroyed.

Destruction shall be by shredding or other appropriate permanent and secure means at the end of the retention period.