

Public Library Records Retention Basics

Shannon Schultz, Admin Consultant
Abbigail Swanton, Records Management

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10:45 - 11:45 Session



WISCONSIN DEPARTMENT OF
PUBLIC INSTRUCTION

Tony Evers, PhD, State Superintendent

Intro & Background

Today's itinerary

- Introduction to the presenters
- Very brief background
- Document tour & walkthrough
- Adoption
- Resources



Introduction to the Presenters

Shannon Schultz, Admin Consultant



- Limited to Chapter 43
- Records touch on various aspects of administration
 - Policy
 - Operations
 - Privacy
- Former library director

Abby Swanton, Records Management



- Coordinates the DPI Records Management Program
- Facilitated most recent update of PL GRS
- Works with public library staff to answer questions
- Records@dpi.wi.gov



Background

Why it matters

- What is a public record?
- What is records retention?
 - Establishes a timeframe for disposal of records no longer required.
- Why the old schedule changed
- What we have now
- Why that is a good thing
- Why it makes things difficult



Document Tour & Walkthrough

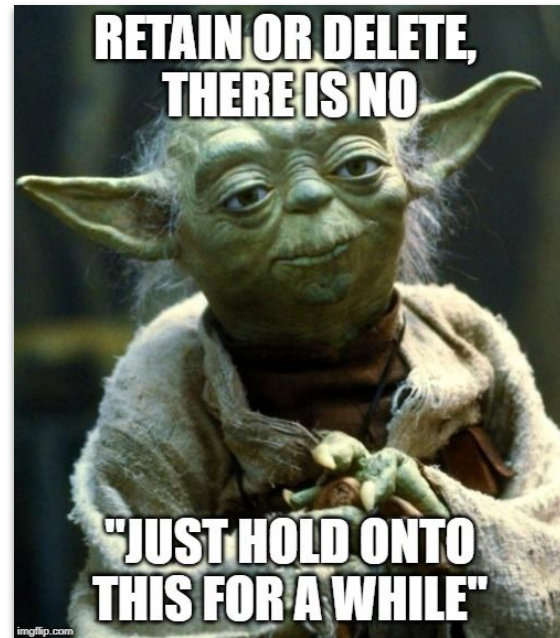
- [DPI Web page on Records Retention Schedule for WI Public Libraries](#)
 - [General Records Schedule \(GRS\) Wisconsin Public Libraries and Public Library Systems and Related Records](#)
 - Meeting Room Use Agreement
 - Board Meeting Minutes
 - Library Card Applications



Summary

Here are Your Steps:

1. Open the [GRS for Public Libraries and Systems](#).
2. Is it a library-specific record or a general record?
 - a. Library-specific retentions are in the first section.
 - b. Not there? Either not a record, or general record.
3. General records are in the Revision History.
 - a. Locate the item and find the record type in "Revision Made" column.
 - b. Click header link to find the correct GRS, open it, and then find the record number to determine its retention.



Ex: Grievances are superseded by **HR**000110
Click the header link to find the "**HR**" GRS (pdf)
Locate the record number

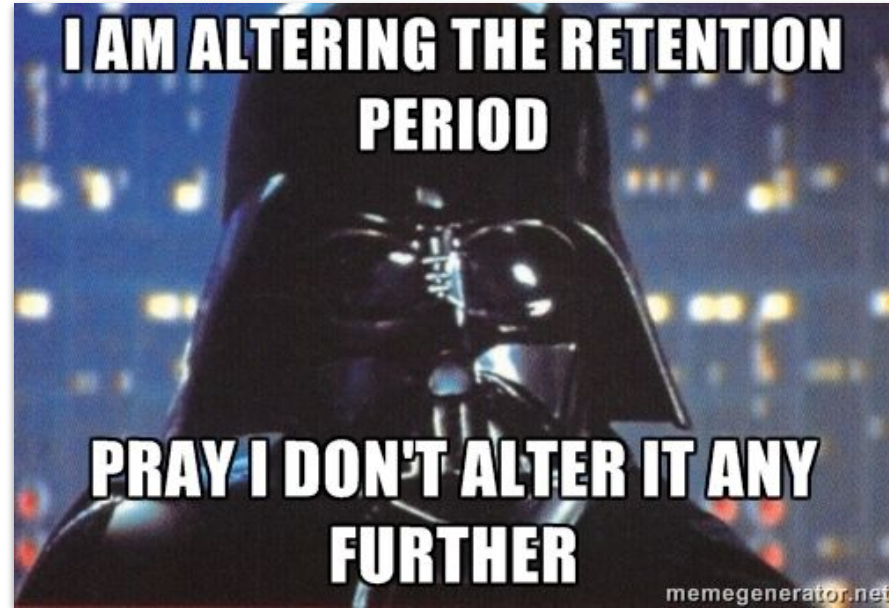


Adoption

Reasons to Adopt the PL GRS

- No longer required to notify WHS when disposing of records
 - Yes, you are responsible for this!
- If you don't you must create your own
- Promotes consistency in records management and the organization
- You will know what you have, and what you don't have

Convinced? [Notification of Adoption](#)



Important Resources

For information or assistance, consider these resources:

- [PR Law Compliance Guide](#)
- [Office of Open Government](#) (DOJ)
- Public Records/Open Meetings Help Line: 608-267-2220, opengov@widoj.gov
- [WI Public Records Board](#)
- [Wisconsin Historical Society](#)
- State Statutes: [16.61](#), [19.31-39](#), [43.30](#)
- [DPI Website](#)
- Abby Swanton, Records
- Shannon Schultz, PL Admin
- System Staff
- [Municipality](#) / County
- Municipal Attorney/Corp Counsel



Thank You!

Feel Free to Ask Questions for the Time Remaining!

You may also email or call Shannon or Abby at DPI
anytime.

Shannon.Schultz@dpi.wi.gov

608-266-7270

Abbigail.Swanton@dpi.wi.gov

608-224-6174

