

CRCEA RECORDS RETENTION POLICY

DOCUMENTS

RETENTION TIME FRAME

Articles of Incorporation Tax Exempt Status/IRS documents	Permanent
Financial Documents such as Year-end documents	Permanent Keep in file with Minutes
Back-up Flash Drive Computer files	Quarterly on CD
Bylaws	Last two revisions
Executive Committee Meeting Records – agendas, minutes, all related attachments, supporting documentation	Permanent
Conferences Minutes, all related attachments	Permanent
Conferences Hand-out materials	2 Years
Correspondence	2 Years
Rosters	5 Years
Association Reports	2 Years
Standing Committee Reports, emails	5 Years
Surveys	Last 2 surveys back
Ad Hoc Committees Reports, related documents	5 Years
White Papers	Permanent
Policy File	Permanent
Intercom newsletters	Permanent

MISCELLANEOUS

Storage Containers should be sturdy cardboard "banker's boxes," plastic file boxes, or metal filing cabinets.

On-line storage should be investigated as a way to backup/store all computer records.

May-2015