

**RECORD RETENTION SCHEDULE**

ITEM	RETENTION PERIOD	STORAGE MEDIA
<b>ORGANIZATIONAL RECORDS</b>		
Articles of Incorporation and Charter	permanent	hardcopy & digital
By-Laws and Standing Rules, and revisions thereof	permanent	all versions: digital
Board Meeting agendas and minutes	permanent	digital
General Membership Meeting agendas and minutes	permanent	digital
Conflict-of-interest disclosure forms	1 year after term is complete	hardcopy
Board resolutions and votes	permanent	digital
Membership resolutions and votes	permanent	digital
List of Board members	permanent	digital
Committee agendas and minutes	1 year after current Coordinator term is complete	hardcopy
Annual reports	permanent	digital
Contracts and agreements	7 years after all agreements end	hardcopy
Correspondence--legal	permanent	digital
<b>FINANCE</b>		
Detailed Year End Financial statements	permanent	digital
Treasurers' Reports, including Balance Sheets and P&Ls	permanent	digital
Bank statements and reconciliations	7 years	hardcopy
Chart of accounts	7 years	hardcopy
General ledgers	7 years	hardcopy
Investment performance reports	7 years	hardcopy
Non-consumable contents and equipment inventories and maintenance records, including disposition	7 years after disposition	digital
Sales Log sheets	7 years	digital
<b>INSURANCE</b>		
Policies	5 years past expiration	hardcopy
Accident reports	7 years	hardcopy
Safety (OSHA) reports	7 years	hardcopy
Claims (after settlement)	7 years	hardcopy
<b>REAL ESTATE</b>		
Deeds	permanent	hardcopy
Rental of Facilities Agreements	7 years after all obligations end	hardcopy
Mortgage and Note	7 years after all obligations end	hardcopy
Mortgage Discharge	permanent	hardcopy
<b>TAX</b>		
IRS exemption determination and related correspondence	permanent	hardcopy
IRS Form 990s	7 years	hardcopy
tax returns and worksheets	permanent	digital
Charitable Organization Registration-Tennessee	7 years	hardcopy
Charitable Organization Certificate	1 year after expiration	hardcopy
Retail Registration License	1 year after expiration	hardcopy

**MEMBERSHIP/PERSONNEL**

Manuals of Coordinators, Chairs	1 year after current encumbant	hardcopy & digital
Orientation and training materials	1 years after use ends	hardcopy & digital
Timesheets of contract employees	3 years	digital
Copies of 1099 forms	7 years	hardcopy
Membership rosters (year end)	permanent	digital
Art-I-Facts	permanent	digital
Categories and rates of Dues	permanent	digital
Categories and rates of Donors	permanent	digital

**TECHNOLOGY**

Software licenses and support agreements	updated and current only	digital
Copier, Security contracts	1 year after expiration	hardcopy
Operating manuals (copier, phone, security, etc)	updated and current only	hardcopy

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