

## **LWVHC Policy #7 DOCUMENT RETENTION**

### **General Policies:**

1. The minutes of all meetings (beginning in 2006) shall be transferred by the Secretary at the end of the year to an electronic storage device and kept with the Secretary until such time as the office is relinquished to the successor. The records shall then be passed to the new Secretary. As time permits, all minutes will be transferred to an electronic storage device and kept at Blue Ridge Community College (BRCC) where a file cabinet is available in the Media Room of the Library. (The President has the key.)

2. Financial records shall be retained by the Treasurer and retained for the following periods:

Bank Reconciliations:	2 years
Bank Statements:	3 years
Duplicate Deposit Slips:	3 years
Internal Financial Review Report:	3 years

Monthly Reports to the Board – May be destroyed after the internal audit has been completed each year, but a copy of the fiscal year-end report shall be retained for permanent record at BRCC.

3. Hard copies of testimony (current year), and general correspondence shall be kept by the President for 2 years. The file shall then be placed in the BRCC storage file cabinet.

4. One copy of research and position papers must be kept for 10 years and filed at BRCC. After 10 years, an executive summary of one page should be made to reduce the volume or a summary scanned to an electronic storage device. These position papers should be available to the chairs of the appropriate portfolio and be utilized in their continued updating of positions.

5. Copies of the Bulletin, League's newsletter, should be kept by the Editor on an electronic storage device for permanent keeping.

6. History of LWVHC as recorded in the printed media shall be permanently retained by the League's Historian and preserved in scrapbook form.

7. Beginning in 2007, the membership roster as of January 31<sup>st</sup> will be recorded on an electronic storage device and preserved permanently at BRCC in a Membership Folder.

8. Inventory of LWVHC listed below are kept currently by the President:

Banner for Parade and Apple Festival  
PA System  
Signs for Parade, Forums, Meetings, etc.  
Local Government Handbooks  
Supply of Stationery and Envelopes  
Stamp and Stamp Pad  
Historian's books and clippings (waiting to find home with the  
historian)  
Cards, member buttons  
Standard League handouts/ special sign up boards for meetings/  
and miscellaneous display items

Adopted February 3, 2007  
Amended February 4, 2010  
Amended November 2015  
Adopted July 2016  
Reviewed September 2017