

Note: Based upon OMGA's Policy which conforms to legal requirements. Policy is expanded for WCMGA.

DESCRIPTION OF RECORD	MANNER OF RECORD KEEPING	TYPE OF STORAGE	DISPOSITION
Articles of Incorporation, Bylaws, Articles of Association and related Policies	Store in organization record book	Paper	PERMANENT
Tax-exempt documents, application of tax exemption, IRS Determination and any related documents	Store in organization record book	Paper	PERMANENT - per law must be kept at Headquarters & available for public inspection
Meeting/Board documents, including agendas, minutes and related documents	Compile and file records on yearly basis. Store in organization records	Paper	PERMANENT - per law must be kept at Headquarters & available for public inspection
Year end Treasurer's financial report/statement	Store in organization record book	Paper	PERMANENT
Treasurer's reports, periodic	Compile and file records on yearly basis. Store in organization records	Paper	3 YEARS Store with financial records. Destroy after 7 years
Bank statements, cancelled checks, investment statements and related documents	Compile and file on a yearly basis	Paper	7 YEARS Store with financial records. Destroy after 7 years
Annual information return information furnished to OMGA	Compile and file on a yearly basis	Paper	7 YEARS Store with financial records. Destroy after 7 years
Scholarships/Fellowships: Application	Compile and file records on yearly basis	Paper	3 YEARS Store with scholarship records & destroy after 3 years
Recipient information including names addresses and school attending	Compile and file applications on yearly basis. Add names to list of past recipients. List should include names, addresses, school attending when scholarship received and yard in which scholarship received	Paper	Permanent. List of past recipients should be kept in organization record book. Additional recipient information including completed application should be filed in a permanent information file.
Selection committee records, including selection criteria used and other documentation regarding the selection process.	Compile and file records on yearly basis	Paper	3 YEARS Store with scholarship records & destroy after 3 years
Contracts and Memorandums of Understanding for Gardens	Compile and file records on yearly basis. Store in organization records	Paper	Equipment rental and loan; 2 years after return of equipment then destroy. Food ordering and delivery records: 4 years then destroy. Other contracts, i.e. space rental 6 years after expiration then destroy
Insurance Policies including Certificates of Insurance	Compile and file records on yearly basis. Store in organization records	Paper	7 YEARS. Destroy 7 years after expiration date

Audit Report	Compile and file records on yearly basis. Store in organization records	Paper	3 YEARS after the report is issued to the membership
Inventory Records	Compile and file records on yearly basis. Store in organization records	Paper	3 YEARS after the report is issued to the Board