

RETENTION PROCEDURES

- It is our goal to use digital storage as much as possible for CSHA records. However, it is recognized that some records will require hard copies to be maintained; e.g. program records, records that require permanent retention in order to guarantee hard copy would always be available, etc.

In the case of permanent records, a hard copy will be prepared and be filed in the State Office by category and by year. Secure off site storage may be utilized as required.

Example: Minutes, Council of Members, and then each set by year.
Minutes, Board of Directors, then by year and

- Records with a destruction date may be maintained in digital or hard copy format as dictated by current office procedure and capability. Digital and hard copy documents will be maintained in an efficient manner that will facilitate access and ease of identification for destruction dates.
- Membership records will be maintained as follows:
The most current edition of each active club's bylaws will be maintained in a digital subject folder.
Current year applications, renewals and rosters will be maintained in digital format filed by year and held for a total of 4 years; i.e. current + 3 years past.
These records will also be retained in hard copy format as a backup and destroyed at the end of the current membership year.

Each year the oldest year of records will be deleted as per the current retention policy.

The following will affect the State Office. It is highly recommended that the Regions follow this or a modified version that fits their circumstances.

No records will be moved to the storage unit except in a standard "banker's box" that is clearly labeled as to the year of the documents, contents of box and destruction date.

It is the responsibility of the Administrative Assistant to maintain an inventory in the State office detailing each box sent to storage, its contents, location within the storage unit and appropriate destruction date.

It is the responsibility of the Administrative Assistant to provide the President with the number of boxes (including age and content) to be physically shredded each year (based on the retention policy) no later than March 30 each year. The President will determine the method of destruction based on quantity; i.e. whether to be done by staff or an outside vendor.