Records Retention Schedule

# Madison SWCD and Clark SCD

**Introduction:**

Proper maintenance of conservation district documents and records is critical from both management and legal aspects. An organization’s provision for the systematic review, retention and destruction of documents received or created by the Madison SWCD and Clark SCD is dependent on keeping accurate records for the proper length of time.

# Purpose:

The following policy is a general overview of certain records and documents, regardless of format, and contains guidelines for how long certain documents should be kept and how the records should be destroyed.

# Permanent Records:

1. Conservation District By-Laws *(are conservation districts required to have bylaws?)*
2. Board Meeting and Board Committee Minutes
3. Board Policies and Resolutions
4. State Sales Tax Exemption Letter
5. Litigation-related documents
6. Insurance matters (policies, claims, accident reports)
7. Contracts (active)
8. Annual audits and financial statements
9. Correspondence (legal)
10. Real estate documents
11. Building blueprints
12. Photos/photo albums/scrapbooks

# Miscellaneous Records:

Contracts (after expiration) — 7 years Payroll register — 7 years

W-2 statements — 7 years Insurance policies — 7 years

Grant applications and contracts — 7 years after completion Bank statements, deposit books, financial records — 5 years Personnel records — 5 years after separation from district Supervisor election records — 5 years

# Varying Retention Times:

Equipment Inventory List for computers, furniture and equipment, etc. – as long as needed.

# Social Media:

Records/Posts that tell the story of the library are permanent records and need to be retained according to the schedule listed above. Examples of these records/posts include:

* + Newsletters
  + Significant or official reports
  + Pamphlets, brochures, posters
  + Manuals/policies
  + Photographs taken during library programs.

# Electronic Documents and Records:

Recordings of meetings will be held until the minutes from the meeting are typed and reviewed by the board. Once the meeting minutes have been approved by the conservation district supervisors, the meeting recording can be deleted. Recordings of training sessions can be kept as long as the information remains valid, and the training is useful to staff and/or trustees.

# Storage, Review, and Destruction of Records:

Supervisors shall be presented with a list of records at the end of their retention time at the January board meeting. Upon approval of the board, records shall be destroyed under the District Employee’s supervision.

Destruction shall be shredding or other appropriate means at the end of the retention time.

Transient records (i.e.,/unsolicited emailed or printed offers) and blurry photos can be destroyed by the administrative assistant or public outreach specialist without specific board approval.

Any records placed in an inactive storage situation shall indicate the date of destruction.

Adopted by Madison SWCD on ????????

Adopted by the ;Clark SCD on ?????????