

I. Purpose:

To assign responsibility for record retention and define the records to be retained and the retention periods.

II. Scope:

All records identified in this policy.

III. Policy:

ASQ National provides member units with SharePoint sites as virtual office space for storing documents needed by the team and archiving required records and other records of interest to the history of the member unit. <http://asqgroups.asq.org/sites> The section SharePoint website is the preferable location to store electronic files. All paper documents are to be maintained by the Historian. Where possible, it is recommended that paper documents be scanned and store on the SharePoint website.

The member of the Leadership Committee bearing responsibility for record retention has the duty to:

- Retain records and provide a safe place to store them while they are in their care;
- Review the records at the start of each year and determine which records are to be destroyed.

The records which are to be retained, the minimum retention time and members of the Leadership Committee bearing primary responsibility for retention are listed below:

Permanently retain the following:

- IRS tax-exemption determination letter from ASQ (available with financial materials) Treasurer
- Minutes (must be maintained by the member unit) Secretary

Retain for at least seven years:

- Financial records Treasurer
- Contracts and Memorandums of Understanding Secretary

Records of Interest

The following records are to be retained.

Official Documents

- Charter
- Bylaws (historic records) and/or operating or management agreements
- Member unit policies
- Lists of current and past members and officers, member directories
- Programs, educational materials, awards information
- Historical files documenting policies, decisions, committee reports, and surveys
- Section publications (one copy of all newsletters, brochures, posters, announcements, etc.)

IV. Responsibility Assigned

- The section Treasurer will maintain all financial records on the SharePoint Website for record keeping.
- All members of the Leadership Committee will forward records covered by this policy to the Historian.
- The section Audit committee will perform a yearly audit of records to insure compliance to this policy.
- In the event that a position bearing responsibility for record retention is vacant, the chair is responsible for retention of records of the vacant position, followed by the Secretary in the event the Chair position is vacant.

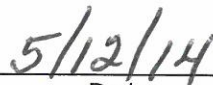
V. Authority



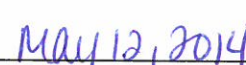
Chair



Secretary



Date



Date