

UNITED STATES POWER SQUADRONS

DISTRICT 9 STANDARD OPERATING PROCEDURE

Title:

RECORDS RETENTION POLICY

No. **29**

Created: 17 Nov 1993

Revised: 27 Oct 2012

1. Each District officer while in office shall be responsible for retention of correspondence or records:
 - A. Initiated, or
 - B. Received as sole recipient, or
 - C. Received as senior officer on distribution of data.
 - D. Electronic data, either as original correspondence, fax, or electronic mail on either a hard or floppy disk.
2. Each District officer, at the end of his term of office, shall dispose of his records as follows:
 - A. Retain in his files.
 - B. Discard.
 - C. Forward to his successor (unfinished business only).
 - D. Forward to historian.
3. The secretary shall have overall responsibility for the District retention files as outlined below.
4. The historian shall be responsible for the maintenance of the District retention files under the direction of the secretary.
5. The historian shall also be responsible for obtaining data from the squadrons for inclusion in the historical files.
6. Retention Files:

Category/Content	Minimum Period	Initiator	Custodian
A. Officer's Correspondence <ul style="list-style-type: none">• Initiated or received• Copies of data sent to historian (optional)	3 years	Officer	Officer

Category/Content (Contd.)	Minimum Period	Initiator	Custodian
B. District Minutes <ul style="list-style-type: none"> • Council and Conference • Seminar Reports • Officer reports Attendance • Squadron membership totals • Committee reports • Budget • Treasurer's reports • Budget audit • Ed. statistics & awards 	Indefinite	Secretary	Historian
C. Tape Recordings <ul style="list-style-type: none"> • Council/Conference 	(*)	Secretary	Secretary
D. Attendance Sheets and/or Voting Cards <ul style="list-style-type: none"> • Council • Conference • Seminars 	(*) (*) (*)	Asst. Sec. Asst. Sec. Asst. Sec.	Asst. Sec. Asst. Sec. Asst. Sec.
E. Organizational Structure <ul style="list-style-type: none"> • District organization • Committees • D9 National officers • Squadron officers • Calendar • Appointed positions 	Indefinite	Secretary	Historian
F. Regulations & Guidelines <ul style="list-style-type: none"> • Standing Rules • Std. Operating Procedures • Bylaws 	Indefinite	Secretary	Historian
G. Finance Records <ul style="list-style-type: none"> • Tax records • Host Squadron finance rpts • Accounting journals/ledgers • Activity financial plans 	7 Years	Treasurer	Treasurer

Category/Content (Contd.)	Minimum Period	Initiator	Custodian
H. Historical			
• Annual Squadron Report	Indefinite	Historian or Sqdn. Sec.	Historian
• District/District related activities	Indefinite	All	All

7. All records designated for minimum retention time shall be preserved accordingly unless the material is to be used in ongoing legal or tax proceedings.
 8. Any deletions to the type of data recorded in the minutes or directory must be reconciled to the record retention policies herein outlined.
 9. The disposition of all records shall be completed no later than thirty (30) days after the Change of Watch for officers whose term of office has expired.
 10. To avoid duplication in record retention, data shall be permanently retained in only one file.
 11. Officers shall not forward records for retention which were not self-initiated except historical data.
 12. Sensitive material shall be retained or destroyed by the initiating officer and must not be forwarded.
 13. Electronic data to be retained should be copied to either a 5W or 3W floppy disk with a label showing the originator, word processor program and version, and inclusive dates of the files. The disk (s) should be forwarded to the designated custodian for retention.
- (*) Records may be destroyed after tabulated results have been published in the minutes and approved by the appropriate body.

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