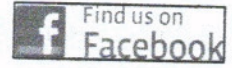




Friends of the San Luis Valley National Wildlife Refuges Document Policy

1. Purpose: The purpose of this policy is to ensure that The Friends of the San Luis Valley manages data in an efficient and effective manner, maintains historical records related to its financial and administrative operations, and purges documents as part of its normal management process. By establishing a specific timeline for document purging, this shall also ensure compliance with the *Compliance Guide for 501(c)(3) Public Charities, Publication 4221-PF*.
2. Definitions:
 - 2.1. "Document" refers to any item listed in the table below, in either hard copy, or electronic form. Electronic files also include those in audio/visual or emailed forms.
 - 2.2. "Administrative" refers to documents pertinent to the day-to-day operations of the Institute.
 - 2.3. "Historic" refers to documents that are valuable for maintaining knowledge of the history of the Institute and its work.
3. Labeling and Storage: All files, both hard copy and electronic, shall be labeled by topic and year (if applicable). Electronic copies shall be saved in appropriate folders on a hard drive. Hard copies shall be stored in file cabinets at the current office of the President. And the Secretary shall have a digital copy of the files.
4. Review and Purging: Review and purging of files may take place in an ongoing manner, but must occur at least every two years in even numbered years, and must follow the minimum retention requirements stated below. Such review and purging must also occur prior to archival storage of any files.
5. Document Drafts: Once the final copy of a document has been completed, the drafts may be recycled or deleted, unless they are documents of legal value. For documents determined to be of legal value, drafts containing comments shall be saved for a minimum of two years, and drafts without comment may be destroyed once the final version is complete.



Document Type	Minimum Retention
Organizational founding documents (e.g. Articles of Incorporation, Bylaws, IRS Letter)	Permanently
Formal meeting Minutes	Permanently
Informal Meeting notes	2 years or longer if topics remain relevant
Funded Grant proposals, reports, correspondence	7 years after closure
Rejected Grant Proposals	2 years after rejection
Budgets	7 years
Memberships	2 years after end
Contract with, invoices from vendors	7 years after expiration/payment
Correspondence (general)	2 years or as long as relevant
Presentations given that can be reused	7 years
Presentations for one use	2 years
Photographs with details of event	Permanent
Press clippings	As deemed historic or relevant
Topical Information, i.e. Notes on Project	2 years or as long as relevant
IRS 990 statements and associated documents	7 years
Year end Financial Reports	7 years
Monthly Financial Reports	7 years

Adopted on: Month Dec Day 4 Year 2020

Signed President of the Board: [Signature] Debra Callahan

Signed Secretary of the Board: [Signature] Lisa Clements