

In order to meet all financial and legal data requirements, this policy sets the minimum retention periods for critical Analemma Society (AS) documents.

The Recording Secretary shall keep the following records:

Item	Description	Min Retention
1	Letters of Determination	Life of AS
2	Letters of Registration	Life of AS
3	Articles of Incorporation	Life of AS
4	Analemma Society Bylaws	Life of AS
5	Analemma Society Policies	Life of AS
6	Analemma Society Annual Reports	Life of AS
7	Cooperative Agreements between FCPA and AS	Life of AS
8	Board Meeting Minutes	10 years
9	List of Board of Directors	10 years
10	Annual General Meeting Minutes	10 years

The Correspondence Secretary as Chairman of the Membership Committee shall keep a list of members and volunteers and as stated in the bylaws, maintain a record of all Analemma Society events (including Friday Night Observing, Parktake Classes, and other events such as Astronomy Festivals, Equinox and Solstice events).

Item	Description	Min Retention
1	Membership & Volunteer Listing	3 years
2	Analemma Society Event Listing	3 years
3	Visitor Attendance Records	3 years
4	Volunteer Records	3 years

The Treasurer shall keep the following records:

Item	Description	Min Retention
1	Monthly Treasurer's Reports	10 years
2	Annual Treasurer's Reports	Life of AS
3	Restricted Funds Documentation	Life of AS
4	Scholarship Documentation and Disbursements	10 years
5	Bank Transactions	10 years
6	Purchase Invoices & Receipts	10 years
7	Federal and State Income Tax	Life of AS
8	Government Notices	10 years
9	W-9	3 years

Analemma Society uses a charge card, receives PayPal membership dues and donations, and reimbursements of grant funds held by the Fairfax County Park Authority (FCPA). These transactions shall be held by the Treasurer as part of the Bank Transactions, Invoices and Receipts.

In the event that W-9s must be issued, the records containing confidential information must be destroyed by shredding at the end of the retention period.

The designated AS Agent for Virginia shall keep the following records:

Item	Description	Min Retention
1	Articles of Incorporation	Life of AS
2	Analemma Society Bylaws	Life of AS
3	Analemma Society Policies	Life of AS
4	Letters of Determination	Life of AS
5	Letters of Registration	Life of AS

6	AS Annual Reports	3 years
7	Federal and State Income Tax	3 years
8	Annual Financial Statement	3 years

Documents may be retained longer than the minimum required period. Confidential information shall be shredded. Record custodians will notify the Board before destroying retained information. In addition to the above, electronic files critical to Analemma Society operation are to be routinely backed-up with back-ups stored in a safe location. Critical electronic files include:

- Financial Spreadsheets that support the Financial Statements
- Articles of Incorporation, Bylaws, Determinations, and Policies
- Annual Reports and Event Records
- Membership/Volunteer Database

Policy Reviewed On Reviewed and Approved By

February 25, 2025 Analemma Society Board Members