

# Analemma Society

## Policy on Document Retention

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:

<b>Item</b>	<b>Description</b>	<b>Min Retention</b>
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	AS Annual Reports	Life of AS
7	Board Meeting Minutes	10 Years
8	List of Board of Directors	10 Years
9	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).

<b>Item</b>	<b>Description</b>	<b>Min Retention</b>
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:

<b>Item</b>	<b>Description</b>	<b>Min Retention</b>
1	Annual Financial Statement	Life of AS
2	Federal & State Income Tax	Life of AS
3	Restricted Funds Documents	Life of AS

4	Scholarship Documents and Disbursements	Life of AS
5	Bank Transactions	10 years
7	Government Notices	10 years
8	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 Analemma Society Agent for Virginia shall keep the following records:

<b>Item</b>	<b>Description</b>	<b>Min Retention</b>
1	Articles of Incorporation	Life of AS
2	Analemma Society Bylaws	Life of AS
3	Letters of Determination	Life of AS
4	Letters of Registration	Life of AS
5	AS Annual Reports	Life of AS
6	Federal and State Income Tax	3 years
7	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**

February 25, 2025

**Reviewed and Approved By**

Analemma Society Board Members