

OREGON ASSOCIATION OF MUNICIPAL RECORDERS

RECORDS RETENTION AND DISPOSITION SCHEDULE

Updated November 2015

Code	Record Series	Active	Inactive	Total
01	Administrative			
	Academy & Conference Records <ul style="list-style-type: none"> • Significant Program Records • Registrations • Other • Contracts 	CY + 2 CY + 2 CY + 2 CY + 2		Permanent 3 years 3 years 3 years
	Articles of Incorporation			Permanent
	Bylaws, Policy and Procedure Records	CY + 2		Permanent
	Activity Reports, General	CY + 2		3 years
	Activity Reports, Annual	CY + 2		Permanent
	Awards <ul style="list-style-type: none"> • Recorder of the Year & President's Award • Other 	CY + 2 CY + 2		Permanent 5 years
	Contracts	Life of contract		Life of contract + 6
	Correspondence, Ephemeral			Retain until read
	Correspondence, General	CY + 1		2 years
	Correspondence, Policy/Historical	CY + 2		Permanent
	Correspondence, Program	CY + 2		Life of program
	Calendars and Notes	CY + 1		2 years
	Drafts and worksheets			Retain as needed
	Elections & nominations <ul style="list-style-type: none"> • Board applications • Nomination material • Ballots / Absentee 	CY + 1		2 years
	Insurance policy records	Life of policy		6 years after expiration
	Legal opinions / Documents	CY + 1		Permanent
	Mailing Lists			Until obsolete or superseded
	Membership applications	Current		CY + 2
	Membership lists	Current		Permanent
	Meeting agendas and minutes including Annual and Special Meetings; Executive Committee, Region, Standing or Special Committee Meetings.	CY + 2		Permanent
	Permissions to reprint	CY + 2		CY + 10
	Press Releases	CY + 1		2 years
	Reports <ul style="list-style-type: none"> • Special Committees 	Active CY + 2		Permanent
	Records Management <ul style="list-style-type: none"> • Retention schedules • Destruction certificates 	Until superseded		Until superseded +10 Permanent
	Publications, Associations	CY + 1		Permanent
	Scholarship records <ul style="list-style-type: none"> • Applications • Funding records 	CY + 1 CY + 1		CY + 2 CY + 6
	Scrapbooks and photographs			Permanent

Code	Record Series	Active	Inactive	Total
	Surveys/Questionnaires <ul style="list-style-type: none"> • Summary reports • Individual responses 	CY + 2 CY + 1		5 years 5 years or until summarized
	Trademarks/logos	CY + 1		Permanent
	Finance and Accounting			
	Budget & Audit Records			
	Budget Committee meeting records			Permanent
	Budget Preparation Records	CY + 1	1 year	3 years
	Adopted Budget	CY + 1		Permanent
	Audit Committee meeting records			Permanent
	Audit Report	CY + 1		Permanent
	General Finance Records			
	Accounts payable	CY + 1		CY + 4
	Accounts receivable	CY + 1		CY + 4
	Balance sheets	CY + 1		2 years
	Bank transaction records	CY + 1		CY + 4
	Check stubs/copies	CY + 1		CY + 4
	Expense reports	CY + 1		CY + 4
	Financial reports	CY + 1		CY + 4
	General ledgers	CY + 1		CY + 10
	Gift & contribution records	CY + 1		CY + 4
	Purchase orders	CY + 1		CY + 4
	Signature authorizations	Until superseded		Until superseded + 6
	Tax reports and related records	CY + 1		CY + 6