**Guidelines For Document Retention**

**INDIANA AREA AL-ANON FAMILY GROUPS**

Records retention is the process of ensuring that organizations maintain and store their records in a safe and secure manner for the purposes of archival, data retrieval, reporting, and record-keeping.  A reasonable record retention policy can keep documentation orderly and organized. The Area records are currently on external storage.

Officer Position Descriptions:

 Current documents in Officer Position Descriptions Folder

 5 revisions kept in Archival Officer Position Descriptions Folder

Coordinator Position Descriptions:

 Current documents in Coordinator Position Descriptions Folder

 5 revisions kept in Archival Coordinator Position Descriptions Folder

Guidelines-Policies:

 Current documents in Guidelines-Policies Folder

 5 revisions kept in Archival Guidelines-Policies Folder

Assembly Minutes:

 Forever – kept in 10-year incremental folders

Area World Service Committee Minutes (AWSC)

 Forever – kept in 10-year incremental folders

Financial Records:

 Current year documents only in Financial Folder:

 Balance Sheet

 Budget Overview – Proposed Budget

 Budget Verses Actual

 Contributions by District

 Group Contribution Summary

 Profit and Loss

 Treasurer’s Report

7 years – Kept in 1-year incremental folders under Archival Financial Records for all documents listed under Financial Records.

Contact Lists:

 Current documents in Contact List Folder

 3 Terms based on elections of Chair/Delegate/Alternate Delegate-Chair in Archival Contact List Folder

 For all District Representatives, Coordinators, Officers, and Past Delegates

Approved 11/12/2022