

**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