

UNITARIAN UNIVERSALIST CHURCH OF THE DESERT

Data Preservation Policy

Policy

It is the policy of the Church to preserve church documents to create a historical record for legal and governance purposes. To that end, the Church will ensure access to documents, use appropriate security measures, and abide by sound document retention practices. Efficient and effective retention is an important church goal and activity.

Responsibilities and Authorities

The Board Secretary, Treasurer and Office Administrator are primarily responsible for ensuring that church documents are *accessible* and *up-to-date* for congregants to access and review, with the Secretary ultimately accountable.

The Board Secretary, Treasurer and Office Administrator are also responsible for ensuring that copies, either electronic and/or hard copies, of documents are *archived* on an annual basis, with the Board Secretary ultimately accountable.

On an annual basis, congregants should receive information about how they can access church documents.

Access to Church Governance Documents

The *Bylaws*, *Policies* and the *Church Covenant* are available in paper copy in the church office, or from the Board Secretary. In addition, electronic copies are available on the UUCOD Website (uucod.org/governance).

Board Agendas, *Minutes*, and current *Strategic Goals* are available from the Board Secretary and posted on the UUCOD Website. Official minutes are posted on the Website once they have been approved by the Board. A paper copy of official minutes is kept at the church.

Current budget information is available from the Treasurer.

Other current Board documents (e.g., *Policies*, safety protocols, annual meeting documents) are also available from the Board Secretary or Office Administrator, and are posted on the UUCOD Website.

Committee information such as meeting notes, reports, brochures, and planning documents should be uploaded to the UUCOD cloud-based storage site (currently Google Drive) where they are accessible to all members of that Committee and to the Board and Lead Minister, or to the UUCOD website. In some cases, paper copies of documents will be maintained in files by the Office Administrator. A technology subcommittee of Facilities manages the UUCOD cloud-based storage site for the church.

Preserving a Historical Record

A copy of all approved written and electronic publications (newsletters, brochures) should be maintained on the UUCOD cloud-based storage site. Church documents should NOT be stored on a personal computer for archival purposes.

Historical documents (paper and electronic) should be kept for the following time periods:

Type	Type of Record	Retention Period	Notes
Accounting Records (Treasurer)	Accounts payable	7 years	More recent years may include electronic and paper copies.
	Accounts Receivable	7 years	
	Audit Reports	Permanent	
	Chart of Accounts	Permanent	Older records may be paper or scanned and stored on the Google drive
	Depreciation Schedules	Permanent	
	Expense records	7 years	
	Financial Statements (Annual)	Permanent	
	General Ledger	Permanent	
	Inventory Records	7 years	
	Loan Payment Schedules	7 years	
	Sales Records	7 years	
Tax Returns	Permanent		
Bank Records (Treasurer)	Bank reconciliations	2 years	Retention may include electronic copies stored on the Google drive or paper copies.
	Bank statements	7 years	
	Canceled or substitute checks	7 years (permanent for real estate purchases)	
	Electronic payment records	7 years	
Non-Profit records (Secretary)	Board minutes	Permanent	Retention may include electronic copies stored on the Google drive or paper copies.
	Business licenses	Permanent	
	Bylaws	Permanent	
	Contracts	Major— Permanent; minor—3 years	
	Insurance Policies	Life plus 3 years	

	Mortgages	Permanent	
Employee Records (President) <i>(Refer to 2020 Personnel Policy)</i>	Benefit plans	Permanent	Retention may include electronic methods stored and secured on the Google drive or in paper copies.
	Employee files	7 years	
	Employment applications	1 year—non- hired 7 years-hired	
	Employment taxes	7 years	
	Payroll records	7 years	
	Pension plans	Permanent	
Real Property Records (Secretary)	Construction Records	Permanent	Retention may include electronic copies stored on the Google drive or paper copies.
	Improvements	Permanent	
	Real estate purchases	Permanent	

Adopted by action of the Board of Directors at its Duly Constituted and Noticed meeting held on December 21, 2021.

 Linda Savard, President

 Rod Belshee, Secretary