



California Native Grasslands Association
 Records Retention & Disposition Schedule
 Approved: 2/10/2015

Good business practice and the law require records be kept for a specified amount of time and properly destroyed when appropriate. CNGA records are all those generated by staff, board, and contractors in the course of CNGA business. Documents not described herein are not required to follow this schedule, and can be disposed of at will. Documents that are not listed but are substantially similar to those listed in the schedule must be retained for the appropriate amount of time.

Records will be kept in a secure place for the specified amount of time. Retention periods reflect the minimum amount of time records must be kept; records may be kept longer at the discretion of the organization. As records become available for destruction, a records destruction inventory must be approved by the Executive Committee prior to destruction.

File Category	Item	Retention Period
Administrative	Grants	7 yrs after completion of grant activities
	Leases	7 yrs after end of all obligations
Board of Directors	Elections	
	Board, Committee, Executive Committee minutes	Permanent
	Conflicts of Interest	2 yrs after end of term
Corporate / Legal / Insurance	Board Policies	2 yrs after superseded
	Bylaws & Articles of Incorporation	Permanent
	Copyright Releases & Policy	Permanent
	Insurance Policies	Permanent
	IRS Determination Letter	Permanent
	Records Retention & Destruction	Permanent
	Reseller Permit Letter	Permanent
	Finances & Taxes	Bank Reconciliations with checks, deposits and statements
Charitable Organizations Registration Statements		7 yrs
Contracts (after expiration)		Permanent
Donations (Matching)		
Financial Statements (Year-end)		Permanent
IRS Forms 1099		7 yrs
Payroll Records		Permanent
Sales/Use Tax Board of Equalization		7 yrs
Tax Records		7 yrs
Voided Checks		7 yrs
Programs	Grasslands Issues	Permanent
	Workshop & Conference Files	Permanent