

File Category	Item	Retention Period
	Contracts and agreements	Expiration date plus 10 years
	Correspondence - general	4 years
	Correspondence - legal and important matters	Permanent
Insurance Records	Policies	Permanent
	Insurance records, current accident reports, claims, policies, etc.	Permanent
	Fire inspection records	10 years
	Safety (OSHA) reports	10 years
Real Estate	Leases	Expiration date plus 10 years
Tax	IRS exemption determination and related correspondence	Permanent
	IRS Form 990's	Permanent
	Withholding tax statements	10 years
	Correspondence with legal counselor accountants, not otherwise listed	10 years after return is filed
Communications	One set of all communication documents kept on-site and one kept off-site	
	Press releases	Permanent
	Annual reports	Permanent (5 copies)
	Other publications	10 years
	Photos/Photo releases	10 years
	Press clippings	10 years
Donor Services	Correspondence - acknowledgment of gifts and grant requests	Permanent
	Donor fund statements	Permanent
Philanthropic Programs	Program selection reports	Permanent
	Scholarship grant records	10 years
	Agreements with other organizations	Expiration date plus 10 years
Technology	Software licenses and support agreements	10 years after all obligations end
Library	Other organizations' annual reports	2 years
	Directories and periodicals	2 years
General Administration	Correspondence - general	10 years
	Correspondence - legal and important matters	Permanent

Electronic Documents and Records

Electronic documents shall be retained as if they were paper documents. Therefore, any electronic files, including records of donations made online, that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an e-mail message, the message should be printed in hard copy and kept in the appropriate file or moved to an "archive" computer file folder. Backup and recovery methods will be tested on a regular basis.