

Records Retention as of 7/20/2017	Minimum Duration	Responsibility	Location	Rationale
				<b>Updated 1/25/2020</b>
Membership Applications	3 yrs	Membership Chair	Membership Chair and Alpine Lodge Storage	
Roster	Permanent	CAC Registrar	In Cloud and on Registrar's computer	Past versions of the roster since shortly after 2000 are maintained in the cloud. There are also backups on the Registrar's computer. People with update access to the roster database are Mark Sapiro and Chris Krueger. <b>UPDATE needed when CRM implemented.</b>
<b>Meeting Minutes</b>				
BoD and Committee Reports	Permanent	CAC Secretary	Website & Tam Bldg	
Alpine	Permanent	Alpine Trustees	Alpine Trustees	Alpine Trustee storing current minutes. History is being collected. Storage for electronic minutes will be on the website.
Echo	Permanent	Echo Trustees	Echo Trustees	Echo Secretary storing current minutes. History is available at Alpine Lodge.
<b>Host Reports</b>				<b>Needed for tax backup data</b>
Alpine	7 yrs	Alpine Treasurer or Alpine Trustee	Alpine Trustee and Alpine Lodge Storage	Alpine Trustee stores the host reports for the current year. History is stored at Alpine Lodge.
Echo	7 yrs	Echo Treasurer	Echo Treasurer and Alpine Lodge Storage	Echo Treasurer stores the host reports for the current year. History is stored at Alpine Lodge.
Trails	Permanent	Publications Chair	Website & Tam Bldg	
Quick Reference Guide	Current	Publications Chair	Website	
By-Laws	Permanent	CAC Secretary	Website	
Resolutions	Permanent	CAC Secretary	Website	

<b>Policies</b>				
CAC	Permanent	CAC Secretary	Website	
Alpine	Permanent	Alpine Trustees	In Training Manual	
Echo	Permanent	Echo Trustees	In Training Manual	
Incident Reports & Insurance Claims	7 yrs	CAC Treasurer	CAC Treasurer	
Insurance Policies	5 yrs	CAC Treasurer	CAC Treasurer	
Chart of Accounts	Current	CAC Treasurer	3 treasurers maintain their own Chart of Accounts	Decision not to consolidate the Chart of Accounts. System working well for 3 treasurers. 2016
<b>Bank Statements</b>				Carl Duisberg, Finance Committee member, reviews the bank statements quarterly for oversight. Banks maintain records as well.
CAC	7 yrs	CAC Treasurer	Banks	
Alpine	7 yrs	Alpine Treasurer	Banks	
Echo	7 yrs	Echo Treasurer	Banks	
<b>Quick Books Files</b>				
CAC	7 yrs	CAC Treasurer	CAC Treasurer	
Alpine	7 yrs	Alpine Treasurer	Alpine Treasurer	
Echo	7 yrs	Echo Treasurer	Echo Treasurer	
<b>Investment Statements</b>				Carl Duisberg, Finance Committee member, reviews the bank statements quarterly for oversight. Banks maintain records as well.
CAC	7 yrs	CAC Treasurer	Financial Institutions	
Alpine	7 yrs	Alpine Treasurer	Financial Institutions	
Echo	7 yrs	Echo Treasurer	Financial Institutions	
Consolidated Reports (annual)	Permanent	CAC Treasurer	Website	
UBI Reports (annual)	Permanent	CAC Treasurer	Website	

<b>Expense Receipts (Operations)</b>				
CAC	7 yrs	CAC Treasurer	CAC Treasurer	
Alpine	7 yrs	Alpine Treasurer	Alpine Treasurer	
Echo	7 yrs	Echo Treasurer	Echo Treasurer	
Dues Change Record	Current	CAC Registrar	Website	Capture of dues changes back to 2001 as best as we have it. It is on the website.
Internal Audit Reports	7 yrs	CAC Treasurer	CAC Treasurer	
Audit Reports	Permanent	CAC Treasurer	CAC Treasurer	
<b>Tax Returns</b>	7 yrs	CAC Treasurer	CAC Treasurer	Files maintained by CAC Treasure at home location.
<b>Libility Forms/Reports</b>				
Outings	3yr	Outings Chair	Stored at Alpine	Form on Website; Reports in folder at Alpine
Alpine Led Hikes	3yr	Hike Leader Chair	Stored at Alpine	Form on Website; Reports at Alpine
Echo Led Hikes	3yr	Host - Submit with Report	Stored with Host reports	Form on Website: Reports with Host report
Vendor Contacts and ID/passwords	Permanent	Margy Eller	Google Docs	Access by Margy Eller, Mark Sapiro, Bill Mayers, Jeff Grimshaw, Angela Kelly, Mary Cosgrove, and Carroll Pearson