This document is created and maintained with at least annual board reviews, and in accordance with the “TMN Chapters Records Retention Policy” document provided by the state program office.

The chapter maintains two electronic web-based services for maintaining our electronic records and copies of documents, files, photos, videos for historical purposes. The major one is our website <txmn.org/elcamino> and the second is our chapter’s official public contact Google account under the name ElCaminoRealMasterNaturalist@gmail.com, and it’s associated Drive and Photos folders.

The chapter website primarily uses its Library tab of content for chapter documents, minutes, and many other files of interest. For historic and educational purposes, we also maintain a significant amount of presentations, files and website references throughout the website as appropriate. For less public documents we use our Members Only (password protected) page for such things as financial reports and our membership directory list (address, email and phone numbers), etc.

The google account is the published email on our website for contacting the chapter. The Google Drive and Google Photos services associated with that account contain a huge library of photos, videos and other files of chapter historic and private or public interest. Many of these folders, files and photos are directly linked from various web site pages for public reference, and not directly loaded into the Web site’s internal media library (some size restrictions).

Chapter Data Record Retention Practices

|  | **File or Document Description** | **Storage Location** | **Retention** | **Access** |
| --- | --- | --- | --- | --- |
| 1. | *Organization and Legal Documents* |  |  |  |
| 1.a | Bylaws, Chapter Management and Operations Protocols, and Chapter Operating Handbook, this document (Data Retention) - current approved version and any versions in process of edit/update/review.  | Website-Library | Latest versions until replaced | Public |
| 1.b | Past outdated versions of the above documents | Only as maintained by Website’s Media Library procedures | Permanent until deleted. Old versions via website media library (Not actively managed) | Web admin login |
|  |  |  |  |  |
| 2. | *IRS records – 501c related* |  |  |  |
| 2.a | Initial application form 1023 and supporting documents | ? |  |  |
| 2.b | IRS determination letter, correspondence | ? |  |  |
| 2.c | Annual IRS returns form 990, 990EZ and attachments | ? |  |  |
| 2.d | EIN number and correspondence | ? |  |  |
|  |  |  |  |  |
| 3. | *Legal Agreements* |  |  |  |
| 3.1 | Office leases, contracts – None as yet. |  |  |  |
| 3.2 | Partnership Agreements with entities outside the TMN program – El Camino Real de los Tejas, Clint Walker Honey Farm, Collier and Peggy Perry, Dale Kruse SM Tracy Herbarium | On Website Library page until discontinued, then via Web Media Library. | Permanent until deleted. Old versions via website media library (Not actively managed) | Public |
|  |  |  |  |  |
| 4 | *Board and Chapter Records* |  |  |  |
| 4.a | Lists of Board Members, Officers and Committee chairs – current | In text on website Organization Page | Until updated | Public |
| 4.b | Past lists of the above (? change to a document format for retention purposes) | None | None | None |
| 4.c | Minutes of Chapter, Board and Committee meetings | Website Library page | All kept online permanent for historical purposes | Public |
| 4.d | Annual Reports to State Office (may be discontinued with VMS?) | Website Members only page. | All kept online permanent for historical purposes. | Password protected. |
|  |  |  |  |  |
| 5 | *Financial Records* |  |  |  |
| 5.a | Annual Budget – don’t do these currently |  |  |  |
| 5.b | Investments – don’t have any currently |  |  |  |
| 5.c | Audit reviews, by year | ? | ? | ? |
| 5.d | Insurance policies – don’t have any currently |  |  |  |
| 5.e | Financial tracking Excel spreadsheet, bank reconciliation info. | Treasurers cloud account (move to chapter’s cloud?) | Permanent, latest accumulated level, by year. | Treasurer. (move to access managed by cloud account manager?) |
| 5.e | Monthly financial treasurer reports | Website Members Only page | All kept online permanent for historical purposes. | Password protected web page. |
| 6 | *Fundraising Records* |  |  |  |
| 6.a | Individual Donor records, part of annual report | Website Members only page. | All kept online permanent for historical purposes. | Password protected web page. |
| 6.b | Grant applications and reports – none yet |  |  |  |
| 6.c | Marketing flyers, documents – no fundraising ones currently |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |