

## BEACON ARCHIVE & DOCUMENT STORAGE POLICY

2024 NOVEMBER

Approved by the Beacon Board of Trustees

### PURPOSE

To guide the Beacon Board in decisions pertaining to the retention, digitization or disposal of Beacon documents.

### GENERAL CONSIDERATIONS

- Canada Revenue Agency requires records to be kept for seven (7) years
- BC Societies Act requires records to be kept for ten (10) years
- Some documents are required to be kept indefinitely, see the Specific Requirements Table.
- Beacon members are less able to store physical records or memorabilia due to downsizing and aging, leading to a necessary transition to digital records where possible.
- In the transition from physical to digital records, there may be expenditures required, for example batch digitization costs. There should be a budget item developed for this process.
- Storage of physical records..... who and where??

### ENSURING SECURITY OF DIGITAL RECORDS

Digital records will be maintained in a private section of the Beacon Website. As well, there will be a section which is confidential to the Beacon Treasurer, holding Pledge Records, Special Donation details and Bookkeeping Records. Standard security precautions will be in place.

### DELETING RECORDS AT THE END OF THE RETENTION REQUIREMENT

The Board will be responsible for arranging for the disposal of materials which have reached the end of the retention requirement. If there are no problems associated with storage of digital items, the disposal may be waived.

### REVIEW OF POLICY

The policy should be reviewed every five years.

## SPECIFIC REQUIREMENTS

DOCUMENT TYPE	RETENTION REQUIREMENT	FORMAT (Digital or Physical)	NOTES
Bills, utilities, general invoices	Current & prior year	Digital where possible	
Bookkeeping records, including General Ledger	7 years	Digital where possible	'Treasurer Only' section of Beacon Website.
Non-confidential Employment Records	7 years	Digital	
Pledge Data	10 years	Digital	'Treasurer Only' section of Beacon Website.
Orders of Service	10 years	Digital	
Beacon Newsletter	10 years	Digital	
Service Recordings	10 years	Digital	
Photos of Beacon Life	Indefinitely	Digital where possible	Beacon Policy
Marriage Register	Indefinitely	Hardcopy only	BC Legislation
Membership Book	Indefinitely	Digital & Physical	Beacon Policy
Criminal Records Checks	Indefinitely	Digital	Beacon Policy, BC Legislation. Maintain list (spreadsheet) of names, roles, date of check, outcome.
Confidential Employment Records	Indefinitely	Digital	Beacon Policy
Special Donation Parameters	Indefinitely	Digital	Who made the special donation? Amount? What was the targeted purpose? Were there timelines specified? 'Treasurer Only' section of Beacon Website.

DOCUMENT TYPE	RETENTION REQUIREMENT	FORMAT (Digital or Physical)	NOTES
Governance Documents	Indefinitely	Digital where possible	Certificate of Incorporation, records of bylaws
Certification Documents	Indefinitely	Digital where possible	Welcoming Congregation, CUC membership, UUA membership