

**ASSOCIATION OF LEGAL ADMINISTRATORS
PUGET SOUND CHAPTER**

**Records Retention Policy
Effective January 2007**

Purpose

The Puget Sound Chapter recognizes the need for orderly management and retrieval of its historical records, as well as a documented records retention and destruction policy. The purpose of this Records Retention Policy is to: (1) provide guidelines as to what should be retained in official files, the location of those files, and the period of time for which they should be saved; and (2) establish permission for the orderly destruction of other materials.

Policy

It is the policy of the Chapter to classify and organize all records to ensure the orderly storage, retrieval, and timely destruction of such records and other materials. It will be the Chapter President's responsibility to verify and ensure compliance with this policy.

Guidelines

Item	Retention Period	Location	Notes
Corporate documents (Articles of Incorporation, Bylaws, corporate license, tax status, etc.)	Forever or most recent	President	
Historical Board Membership	Forever	President	
Board Leadership Training Retreat Materials (from 1999)	Forever	President	
Vendor database	Ongoing	Director of Vendor Relations	
Educational Materials: Essentials of Legal Education; CLM Study Group Curricula, Business Skills for Attorneys Curricula	6 years	Director of Education	
Newsletters	Forever	Newsletter Editors	
Salary Surveys Survey materials	5 years 2 years	Compensation Survey Chair	
Library Materials: Books, audio tapes and CDs, DVDs	Audio/video materials: 2 years from date of purchase Books: 10 years from date of purchase	Librarian/Historian	With exceptions for "timeless" ones

Chapter meeting notices, location, attendance, cost, speakers	Forever		
List of vendors, sponsorship amounts, benefit for each level	Forever		
Web site map	Ongoing	Website	
Chapter History	Forever	Website	
List of chapter awards	Forever	Website	
List of Community Service Award recipients	Forever	Website	
List of Diversity Award recipients	Forever	Website	
Chapter awards	None	Give to responsible individuals	