

**SOUTHWEST OHIO ORGANIZATION FOR SCHOOL HEALTH (SWOOSH)
SCHEDULE OF RECORDS RETENTION AND DISPOSITION**

SWOOSH's *Schedule of Records Retention and Disposition* describes the management of SWOOSH's records, indicating for each the length of time the record is to be maintained. The purpose of the Schedule is to ensure that necessary records and documents are adequately protected and maintained, and to ensure that records that are no longer needed by SWOOSH or are of no value are discarded at the proper time.

Category	Record Title and Description	Document Control	Retention Period	Notes
Administrative Records				
	Participation Agreements	Secretary	Permanent	
	Bylaws	Secretary	Permanent	
	Board Meeting Notices	Secretary	1 Year	
	Agendas	Secretary	1 Year	
	Meeting Minutes	Secretary	Permanent	
	Board Policies and Adopted Policies	Secretary	1 Year After Superseded	
	Agreements and Contracts	Secretary/Treasurer	10 Years After Expiration	
	Court Decisions	President	Permanent	
	Claims & Litigation	President	Permanent	
	Organization Reports	President/Secretary	2 Years	
	Annual Reports	Secretary	3 Years	
Financial Records				
	Budget Policy Files	Treasurer	5 Years	
	Banking Documentation	Treasurer	4 Years	
	Budget	Treasurer	5 Years	
	Expense Reports	Treasurer	4 Years	
	Financial Reports	Treasurer	4 Years	