



Royal Astronomical Society of Canada (RASC)

Halifax Centre

Dedicated to the Advancement of Astronomy and Allied Sciences

G15: Policy Regarding Document Retention

(Approved: April 29, 2025)

Background

In October 2023, the Board was asked to develop a policy on the retention of documents. This was a significant issue for some officers, especially the Treasurer, who had been given several large boxes with financial records, *etc.*, extending back for many years. This policy relates to both current and future documents. The locations of specific documents can be found in the *RASC Halifax Centre Board Reference Manual*.

Rationale

There may be Centre history or a legal rationale for retention. This policy provides a framework for determining which documents are stored and which are discarded.

This policy covers the retention of documents in the following main areas:

1. Financial documents to meet legal requirements.
2. Historical interest.
3. Continuity as Board membership changes.
4. E-mail and correspondence.
5. Fundraising.
6. Property and Leases

Policies Regarding Document Retention

1. All financial documents should be kept by the Treasurer for a minimum of seven years to meet CRA requirements. Copies of 7-year-old and older summaries of our financial statements provided to our Centre's AGM, the Society and the Registry of Joint Stock Companies (RJSC) should be kept and all supporting documentation destroyed.
2. Documents related to special Centre events should be kept indefinitely. These events would include awards, special events at the St. Croix Observatory, public observing events, Nova East, General Assemblies, *etc.*
3. The minutes of past Board meetings will be kept indefinitely. To help old and new Board members, a separate document of significant motions from board minutes and on-line communication between meetings per *Policy B1: Terms of Reference Board of Directors* should be kept. This document would **not** include routine motions such as approving agendas, approving minutes, approving reports, *etc.*
4. All Board and Executive e-mail that is sent to an e-mail address with @halifax.rasc.ca should be kept for a minimum of three years. This would provide new members access to past correspondence to learn how business was conducted by their predecessor. The RASC Halifax Centre Discussion List should continue to be archived on the list server.
5. Fundraising events should keep a permanent list of all donors.
6. Deeds for any property owned by the Centre, and any leases for land should be kept permanently. Receipts for any items purchased for the St. Croix Observatory (SCO) that cost over \$100.00 should be kept, along with any manuals, *etc.*, as long as the Centre owns the items.