

## **Archiving and Document Retention Policy for Concord Quarterly Meeting Records, approved May 2, 2021 at CQ Planning Committee**

For historical purposes, Concord Quarter should regularly deposit certain documents with the Friends Historical Library, Swarthmore College, 500 College Ave, Swarthmore PA 19081. Its current Archivist is Jordan Landes, email: [friends@swarthmore.edu](mailto:friends@swarthmore.edu)

### **What to send:**

- Minutes (approved), including Quarterly Meeting (with full financial information), Planning Committee, Delaware Valley Friends School/Concord Quarterly Meeting Care Relationship Committee, and Working Group on Aging Concerns and other committees or working groups that may be formed from time to time , but **not** Nominating Committee.
- Newsletters
- Reports, correspondence and other documents that may be of historical value
- Selected photos (already published on the website, flyer or on social media)
- Flyers for events

### **What not to send:**

- Separate financial information. The budgets, which Friends Historical Library does want, are included with the full minutes of Quarterly Meeting (non redacted)

**Format:** we can send electronically as a PDF or PDF/A (more stable than a plain PDF), or electronic copies via a flash drive, or hard copies on acid free paper or both electronically and as hard copies. The Coordinator sent files electronically in May 2020 via Dropbox with confirmation received.

A set of documents to be archived were saved by year with titles per Friends Historical Library preferences and put in special folders.

**Schedule:** Every three years. Records from 2017 through 2019 were sent in 2020 as noted above (but not photos and flyers. There are plans to send those in the spring of 2021.

### **Other Record Retention:**

In addition to those records which are retained at the Friends Historical Library, there are records held by Concord Quarterly Meeting that should be retained for certain time periods. See the separate spread sheet for that list and the time periods.

### **Hard Copies:**

Very little exists only as hard copies other than sign in sheets for events (which can also be stored as digital pictures), emergency contact forms for children (which need to be updated or redone every year), and applications for the CQ Tuition Aid program, along with a couple of copies of each newsletter (which is also digitally stored). Everything else is digital, even if it also exists as a paper copy.

The Coordinator saves paper receipts, but makes digital copies for the Treasurer's information.

**Back up:**

The electronic Concord Quarter records should be backed up and not exist solely in one or two computers. They should be backed up via cloud storage, and ideally via an external hard drive, daily. Passwords should be at least 14 characters and not be the same for every account. As of summer 2020, the Treasurer and Coordinator records are backed up with iDrive, through a Concord Quarter account set up with the Coordinator email. It can be used with more than one computer in various locations and so can be transferred to another computer if the roles are filled by different people. Only the relevant files to Concord Quarter are saved to iDrive.

The Coordinator has also used a separate back up drive attached to her computer to back up files.

Lynne Piersol, Coordinator

9/22/2020, revised 4/28/2021