



Conservation Districts of Iowa  
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## Document Retention Policy

- Common time periods to retain documents are 2, 7, and 10 years.
- Some documents and business records of a nonprofit should be maintained permanently, such as:
  - Articles of Incorporation
  - Determination Letter from the IRS
  - Insurance Policies
  - Minutes of Meetings
  - Resolutions

Document Type	Value	Retention Requirement	Destruction Method
Organizational founding documents (e.g. Articles of Incorporation, Bylaws, IRS Letter of Determination)	Legal, historic	Permanently	N/A
Formal meeting notes (e.g. Board, Advisory Committee)	Administrative, historic	Permanently	N/A
Informal (handwritten) meeting notes (e.g. staff meetings)	Administrative	2 years, or longer if topics remain relevant	Recycle/scrap paper
Funded grant proposals, reports, correspondence, etc.	Administrative, historic, legal	7 years after closure	Shred financial and private information, or recycle/scrap; delete electronic version
Rejected grant proposals, correspondence, etc.	Administrative, historic	2 years after rejection	Shred financial and private information, or recycle/scrap; delete electronic version
Timesheets	Administrative, historic, legal	7 years after end of employment	Shred if contains personal information, or recycle/scrap
Expense reports	Administrative, historic, legal	7 years after end of employment	Shred if contains financial information, or recycle/scrap
Budgets	Administrative, historic, legal	7 years	Shred; delete
Subscriptions/memberships	Administrative, historic, legal	2 years after end of subscription	Shred if contains financial information, or recycle/scrap
Employee evaluations	Administrative, historic, legal	7 years while employed, 2 years after end of employment.	Shred; delete

Contracts with, invoices from vendors	Administrative, historic, legal	7 years after expiration/payment	Shred; delete
Workshop files	Administrative, historic, and/or legal		
▪ Marketing		▪ 7 years	▪ Recycle/scrap; delete
▪ Attendee list		▪ 7 years	▪ N/A
▪ Invoices from consultants or payment record from attendees		▪ 7 years	▪ N/A
▪ Contracts with consultants		▪ 7 years	▪ N/A
▪ Payments for food/supplies		▪ 7 years	▪ Shred
▪ General information		▪ 2 years	▪ Recycle/scrap; delete
Topical information	Administrative	2 years, or as long as still relevant	Recycle/scrap; delete
Correspondence (general)	Administrative, historic	2 years or as long as still relevant	Recycle/scrap; delete
Presentations given	Administrative, historic		
▪ Presentations that can be reused		▪ 7 years	▪ Recycle/scrap; delete
▪ Presentations for one use		▪ 2 years	▪ Recycle/scrap; delete
Photographs	Administrative, historic		
▪ High quality with details of event		▪ 10 years	▪ Recycle/scrap; delete
▪ Photos missing details of event		▪ 2 years	▪ Recycle/scrap; delete
▪ Low quality		▪ 2 years	▪ Recycle/scrap; delete
Press clippings	Historic	Permanently if electronic or a hard copy without electronic backup; 2 years for hardcopy with backup	Recycle/scrap