

R. RECORD RETENTION AND STORAGE - Use of Digital Technology

Policy:

The Central Oregon Master Gardener Association (“COMGA”) strives to use technology to create and maintain relevant documents and emails that are generated to meet the Chapter’s needs. Historic data and document storage and retrieval is vital for the smooth operation of our projects and our board operations.

Purpose:

The purpose of this Policy is to ensure that necessary records, emails, and documents, whether in paper or digital format, are adequately protected and maintained, and to ensure that records that are no longer needed or are of no value are discarded in a timely manner. This Policy is also intended to help COMGA members understand their obligations in creating and retaining documents or files, including emails, Web files, text files, sound and movie files, photos, PDF documents, and all Microsoft Office or other formatted files. From time to time, COMGA may establish retention or destruction policies or schedules for specific categories of records, to ensure legal compliance, and to accomplish other objectives, such as preserving intellectual property.

Procedure:

1. Digital and Cloud Applications: From time to time, as deemed necessary by the Chapter, COMGA will identify various digital and cloud storage applications and software (see Appendix A-Key Terms) to be used by the members of the Board, Project Coordinators, and other master gardener volunteers, when conducting business on behalf of the Chapter.
2. Responsibilities of the “Administrator”: The COMGA President, with the advice of the Board and the COMGA Tech Committee, shall identify an individual to act as the Administrator of this Policy. The Administrator’s responsibilities include:
 - a. creating and providing access to authorized accounts, for Board members and Project Coordinators;
 - b. deleting accounts or access when Board or Project Coordinator positions change;
 - c. coordinating the retention and destruction of documents pursuant to this Policy and particularly the Document Retention Schedule included in Appendix B. The Administrator shall confer with the COMGA Board before documents or files are scheduled to be archived or destroyed.
3. Responsibilities of COMGA Board Members, Project Coordinators and Volunteers: All Board members, Project Coordinators and volunteers should store electronic documents, emails or files generated while doing official business on behalf of the Chapter, on the electronic platforms in current use by COMGA. These platforms may change over time, depending on advances in technology. Paper documents or files shall be retained in a place designated by the Board. Paper and digital records are subject to the same retention schedule as outlined in Appendix B. Examples of documents, whether in paper or digital format, to be retained include, but are not limited to:
 - a. Reports prepared by Project Coordinators
 - b. Mailing lists of project or class participants
 - c. Financial records and reviews
 - d. Membership data
 - e. Educational presentations approved by the local OSU Extension Master Gardener Program Coordinator
 - f. Minutes of Chapter and OMGA board meetings
 - g. Insurance policies
 - h. Contracts

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4. **Emergency Planning:** Documents shall be stored in a safe and accessible manner. Documents which are necessary for the continued operation of COMGA, should be regularly duplicated or backed up in case of an emergency.
5. **Document Creation and Generation:** Board members and Project Coordinators will be trained in the proper methods and best practices for document/file creation and retention, which include emails generated and sent to the public or vendors when conducting business on behalf of the Chapter (e.g., emails sent to attendees for spring seminar should be generated from the spring seminar email account). A user's guide shall be available to all members, on the members' page of the COMGA website, which will include all aspects of document, file and email creation and retention.
6. **Document and Database Storage:** All paper and electronic documents or databases related to projects or board positions shall be saved and retained in the appropriate physical location, digital account, or website, according to the schedule in Appendix B, for access by future Users and the general membership, with the following caveats:
 - a. The Horticulture Agent must approve all education presentations before they are uploaded to a digital site;
 - b. Assets and Project Review Documents will be stored under the Administrator's account;
 - c. Pictures will be stored in Flickr which provides unlimited storage for our subscription;
 - d. KPOV transcripts will be stored on the COMGA website.
7. **Document Destruction:** Hard copies of documents will be destroyed by shredding after they have been retained until the end of the Document Retention Schedule. Shredding may be accomplished through a professional shredding service or through local means. In either case, there must be a witness to the event so the fact of shredding can be validated. Electronic copies of documents are to be archived or deleted by the administrator, who shall certify through computer reports or other reporting mechanisms, which documents were deleted from the electronic records.