

## VI. RETENTION OF NONFINANCIAL RECORDS<sup>1</sup>

**General requirements and responsibilities.** As an organization significant in the cultural history of Washington DC, the Friday Morning Music Club retains records necessary to support current operations and submits records of completed activities for archiving. The purpose of the Archives is to preserve a picture of how the club functioned over time to allow people of the future to understand the past.

Each member who holds an official elected or appointed position is responsible for 1) creating, organizing and maintaining current records on the activities or operations under his or her jurisdiction, 2) submitting records of completed activities to the Club office for retention at the close of that activity or concert season, 3) transmitting records still in use (including background documents) to his or successor upon leaving office, 4) listing required records in his or her Position Description, and 5) familiarizing that successor with the nature and content of those records and with these retention requirements

Each officer and director who oversees multiple competitions, groups, committees or concert series must create a records submission plan and inform the Archivist and the Board whether records will be submitted directly from sub-officials or coordinated through the supervisor and, if submission is decentralized, how compliance will be monitored.

Most records are held in the Club's offices for at least 5 years, after which they are prepared for storage in the archives of The Historical Society of Washington, DC.

The President of the Club appoints an Archivist to provide guidance on records retention, oversee the collection of record, and prepare Club records for archiving. The Director of the Foundation appoints an Archivist to prepare Foundation materials.

**Definition of 'record'.** The term 'record' includes paper documents, electronic files, Web pages, recordings, images and concrete objects. It includes both records produced by the club and records produced by others about the Club or its members, such as obituaries and concert reviews. **Because electronic records may be rendered unreadable as technologies change, records held electronically for current use must be printed out for storage.**

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<sup>1</sup> For guidance on financial records, see VIII.D, Financial record retention and destruction policy

**Nonfinancial records required of each officer, director, committee or task force chair, and competition chair.**

1. Annual or final report. An annual or final report is a written summary of activities, outcomes, and significant developments or issues that arose during the period covered and generally includes supporting data pertinent to that position, such as numbers of copies printed and how they were distributed, numbers and locations of events held, and participants.

Each officer, director, committee or task force chair, and competition chair in the FMMC and the Foundation, except as noted below, submits a summary report at the end of the season (annual report) or at the completion of the activity. The Recording Secretary is required to submit a report only when the position involves activities beyond the preparation of minutes: otherwise, the minutes alone are sufficient for the record.

The FMMC Foundation Director's annual report incorporates reports from the Foundation's other officers and chairs.

Copies of annual reports to are due as follows:

- a. Each official retains one copy of his or her report for the operating files for that position. If submitting records for the archives, the official includes a copy of the annual report in the packet of records.
- b. Three copies are due to FMMC at the Annual meeting or as soon thereafter as activities for the year are completed—no later than October 1. One of these copies goes to the President, another to the Newsletter Editor, and the third to the Recording Secretary, to be archived with the minutes of that Annual Meeting.

Copies of final reports are due at the time the report is presented, and are filed and distributed in the same manner as annual reports.

2. FMMC Web pages. Each page owner listed in Section V. E, FMMC Website Policies, is responsible for making three printed copies of the page each time it is substantively changed: one for the permanent file for that office and two for the Club's archives. The archive copies are submitted with other materials at the end of each season.
3. Other pertinent materials. Each officer, director, committee or task force chair, and competition chair in the FMMC and the Foundation submits the following materials as pertinent to his or her function. Materials should be submitted in June unless originals

are needed for reference in the following year. Original copies of materials needed for reference may be kept for no longer than one additional year. At that time, any still needed for reference should be copied for the official's working files and the originals sent to the office for storage.

- a) Written and graphic materials produced and distributed in print or online, such as announcements, ads,<sup>2</sup> brochures, application forms, guidance documents, competition or concert programs, press releases, power point presentations, and the texts of speeches.
- b) Correspondence: Letters, emails, written notes on or printed or handwritten records of conversations significant to future operations or to the Club's history.
- c) Photographs, artwork and artifacts, and other memorabilia.
- d) Non-Club documents that concern Club members or activities, such as obituaries and articles from print or electronic media.

**Records specific to certain functions:**

1. Auditions and competitions: Completed application forms and judges' completed judges' completed rating forms should be retained in the chair's records for one year. At the end of that year, the judges' completed forms should be destroyed and the applicants' forms sent to the Club Office for filing.
2. Board minutes: A full set of approved minutes for the current Board year (June through May), showing the Secretary's signature in ink, is due for filing at the Club office at the close of the June Meeting. Each month's minutes should include as attachments all reports or other documents presented at the meeting.
3. Confidential materials: Materials that concern sensitive issues such as personnel matters should be placed in an envelope and taped shut. The envelope should be labeled "not to be opened until [date far enough distant to protect the privacy of individuals involved]" and include a brief statement indicating the nature of the materials concerned, such as "personnel action regarding [person's name]". The Archivist files it appropriately.

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<sup>2</sup> For recurrent ads, a single illustrative instance is sufficient.