

COOP PRESCHOOL RECORDS RETENTION

How Long Do We Keep...	Current + 1 year	Current + 5 years	Permanent	Other
Risk Management Area **				
Child Release form*	●			
Consent forms*	●			
Field Trip Notification form	●			
Field Trip Permission form*	●			
Insurance Claim forms*				Until child is 21
Report forms - Accident*				Until child is 21
Report forms - Incident*		●		
Safety checklist	●			
Sign in/Attendance forms	●			
Special Events form	●			
Voluntary Driver forms*	●			
Business Management Area				
Articles of Incorporation			●	
Bank Statements*		●		
Budgets		●		
By-Laws			●	
Check Register		●		
Employee Information *		●		
IRS Filings (941, 990) and supporting docs*		●		
Lease/Rental agreements		●		
Letter of Determination (IRS-501(c)3) & supporting docs			●	
List of Officers*			●	
Minutes of Meetings - Board (Incl. Financial Statements)			●	
Minutes of Meetings - Membership		●		
Payroll*		●		
Receipts		●		
State Certificate of Organization			●	
State Filings (L&I, Non-Profit Corp Renewal, etc.)*		●		
Treasurer Reports		●		
Tuition Tracking		●		
Program Management Area				
Copies of Recruitment Flyers	●			
Membership lists (adults & enrolled children)*		●		
Newsletters	●			
Registration forms*		●		
Scholarship/Financial Assistance Information*		●		

* Documents must be shredded when purged

** This is the recommended retention, however, if the document is relevant to an Accident or Incident Report than it should be retained longer.