



Records Management and Retention Guidance

Every rowing club creates records. Some support current operations, while others document the organization's history and the people who have been part of it.

Records management is the process of organizing, maintaining, retaining, and, when appropriate, disposing of those records. Good records management helps clubs find important information when needed, supports leadership transitions, reduces unnecessary duplication, and identifies materials that may have long-term historical value.

Records may exist in many formats. Some remain on paper, while others are created and maintained as [born-digital records](#), such as emails, spreadsheets, word processing documents, digital photographs, audiovisual recordings, websites, social media content, and PDFs.

This guide provides practical recommendations for managing records throughout their lifecycle, from creation and active use to long-term retention, historical preservation, or eventual disposition. Not every recommendation will apply to every club, and that is expected.

While every club is different, most records fall into a few broad categories:

- Governance records, such as bylaws, policies, and meeting minutes
- Financial records, including budgets, tax filings, and audits
- Administrative records and correspondence
- Membership and operational records
- Program and event documentation
- Communications and publications
- Historical and archival materials

This guide complements the Rowing History Project inventorying process. While the inventory focuses on identifying and documenting historical materials, records management helps clubs organize and maintain records throughout their lifecycle. Together, these activities help clubs manage current records while preserving materials that document their history.

Table of Contents

Introduction	1
1. Purpose & Scope	2
2. Core Concepts	3
3. Roles & Responsibilities	6
4. Records Categories	7
5. Retention & Disposition.....	11
6. Managing Born-Digital Records.....	12
7. Archival Records & the RHP Inventory	17
8. Getting Started.....	19
Appendix A. Sample Records Retention Schedule.....	21
Appendix B. Records Location Inventory Worksheet	23
Appendix C. Leadership Transition Checklist.....	24
Appendix D. Digital Records Self-Assessment	26
Appendix E. Sample Folder Structure	28

1. Purpose & Scope

The goal of this document is to help rowing clubs:

- Maintain records that support ongoing operations
- Identify records that should be retained for administrative, legal, financial, or historical value
- Reduce unnecessary duplication and the risk of losing important records
- Support transitions between officers, board members, coaches, volunteers, and future club leadership
- Establish practical habits for managing physical and digital records

This guide distinguishes between two broad types of records:

- **Active organizational records**, which support current operations and day-to-day activities
- **Archival or historical records**, which document the history of the club and may be appropriate for long-term preservation or inclusion in the Rowing History Project

Not all records need to be retained permanently, and not all records are appropriate for inclusion in the Rowing History Project. Some records serve a short-term purpose, while others have ongoing administrative or historical value.

Individual clubs may have legal, financial, or institutional requirements that differ from these recommendations. This guide provides a practical starting point for managing records over time.

2. Core Concepts

Most records management decisions come down to a few basic questions:

- Is this a record?
- How long should it be kept?
- Where should it be stored?
- What should happen to it when it is no longer needed?

The following concepts can help clubs answer these questions and make consistent decisions about their records.

Records vs. Non-Records

Records are materials created or received in the course of organizational activities and retained as evidence of those activities. Records may support current operations, document decisions, meet legal or financial requirements, or help preserve the organization's history.

Examples of records include:

- Board and committee meeting minutes
- Financial statements and tax filings
- Membership records

- Event planning materials
- Newsletters and publications
- Photographs documenting club activities
- Contracts and agreements
- Historical correspondence

Non-records are materials that do not need to be retained because they have little or no ongoing administrative, legal, financial, or historical value.

Examples of non-records may include:

- Duplicate copies kept for convenience
- Blank forms
- Published reference materials not created by the club
- Drafts that are no longer needed
- Temporary reminders or notes

Distinguishing between records and non-records helps reduce unnecessary accumulation and makes important information easier to find. Not everything needs to be kept.

Retention vs. Storage

Retention refers to how long a record is kept.

Storage refers to where and how a record is kept.

The two concepts are related but not interchangeable. A record may be retained appropriately but stored poorly, or stored carefully but retained longer than necessary.

For example:

- A box of meeting minutes stored in a damp basement may be retained permanently but poorly stored.
- Important digital files saved only on a personal laptop may technically exist but remain vulnerable to loss.
- Duplicate copies of event flyers stored across multiple drives may be well backed up but unnecessarily retained.

Records should be kept for an appropriate length of time and stored in a way that allows them to remain accessible and usable.

Disposition

Disposition refers to what happens to a record when it reaches the end of its retention period.

Records may be:

- Destroyed when they are no longer needed
- Retained permanently because they have ongoing administrative, legal, financial, or historical value
- Transferred to archival storage or included in the Rowing History Project inventory

Disposition should be intentional and consistent.

When you are unsure whether a record has long-term value, retain it temporarily until it can be reviewed more carefully.

Lifecycle of Records

Most records follow a basic lifecycle:

1. Creation or receipt
2. Active use
3. Inactive storage
4. Disposition or long-term retention

This process does not need to be formally tracked in most rowing clubs, but it can be helpful to recognize that records naturally change in value and use over time.

For example:

- A regatta planning spreadsheet may be heavily used for several months, referenced occasionally the following year, and eventually discarded.
- Board meeting minutes may remain useful indefinitely and become part of the club's permanent historical record.

3. Roles & Responsibilities

Each club should establish a basic structure for managing records, even if responsibilities are informal.

At a minimum, clubs should determine:

- Who manages shared digital storage locations
- Who can approve the destruction of records
- Who ensures that important records are transferred during leadership changes
- Who serves as a point of contact for historical materials and Rowing History Project activities

Records responsibilities often develop informally over time. A longtime volunteer, officer, coach, or committee member may become the unofficial keeper of photographs, financial files, regatta programs, membership records, newsletters, or historical materials. This can create challenges when leadership changes, records become difficult to locate, or materials are stored on personal devices and accounts that others cannot access.

Whenever possible, clubs should gradually transfer important records into shared organizational custody rather than relying entirely on individual members. This does not require creating a formal archive. Establishing shared digital storage, centralizing meeting minutes, or identifying a consistent location for historical photographs can improve continuity.

Records management responsibilities do not need to be assigned to a single person. They may be shared among officers, coaches, committee chairs, volunteers, or historical committees. What matters is that responsibilities are understood and important records can be located and accessed when needed.

Leadership transitions are a common point of risk for record loss. Outgoing officers and volunteers may have digital files, email correspondence, photographs, or paper records that are not stored elsewhere. A routine process for transferring records can help ensure that important information remains accessible to future club leaders. **See Appendix C for a Leadership Transition Checklist.**

4. Records Categories

Records may exist in both paper and digital formats. A paper document and a digital file may serve the same purpose and generally warrant the same retention considerations. For example, meeting minutes may exist as both a printed binder and a PDF.

The categories below reflect common types of records maintained by rowing clubs. Most records can be grouped according to the function they serve rather than their format.

Governance Records

Governance records document how a club is organized, how decisions are made, and how responsibilities are assigned.

Examples may include:

- Board meeting minutes
- Committee meeting minutes
- Bylaws
- Constitutions and governance documents
- Policies and procedures
- Strategic plans
- Annual reports

Governance records document major decisions, organizational priorities, leadership changes, and significant events. They can also help future officers understand why decisions were made and provide continuity during leadership transitions. Because these records frequently become part of an organization's historical record, they are often retained permanently.

Financial Records

Financial records document how a club manages and spends its resources.

Examples may include:

- Budgets
- Financial statements
- Tax filings

- Audit reports
- Invoices and receipts
- Payroll records
- Grant documentation
- Banking records

Financial records support accountability and may be needed for legal, tax, insurance, or administrative purposes. While not all financial records require permanent retention, high-level records such as budgets, financial statements, tax filings, and audits may have long-term administrative or historical value.

Administrative Records

Administrative records support the day-to-day operation of the organization.

Examples may include:

- General correspondence
- Planning documents
- Internal reports
- Schedules
- Routine operational files
- Draft documents
- Vendor information

Administrative records are often created in large quantities and vary widely in importance. Focus on retaining records that document meaningful activities, decisions, obligations, or responsibilities while avoiding unnecessary accumulation of routine duplicates and temporary files.

Membership and Operations Records

Membership and operations records document the individuals who participate in the club and the activities required to support ongoing operations.

Examples may include:

- Membership lists

- Contact information
- Registration forms
- Participation records
- Volunteer records
- Safety documentation
- Equipment and facility records
- Operational procedures

These records help support continuity and day-to-day management. They may also contain personal or sensitive information and should be managed accordingly.

Programs and Activities

Programs and activities records document the events, programs, competitions, and activities that make up club life.

Examples may include:

- Regatta records
- Event programs
- Race results
- Training programs
- Outreach initiatives
- Youth program records
- Club newsletters
- Event photographs

These records may document broader aspects of club, community, and social history. Clubs should not assume that only championship victories or major anniversaries are historically important. Routine activities, volunteer efforts, youth programs, community events, and informal club traditions may also become valuable historical documentation.

Media and Communications

Media and communications records document how a club communicates with members, the public, and the broader rowing community.

Examples may include:

- Newsletters
- Press releases
- Websites
- Social media content
- Promotional materials
- Publications
- Photographs
- Audiovisual recordings

Websites and social media content are also records of organizational activity, but clubs should not assume that content posted online will remain accessible indefinitely. When feasible, important photographs, newsletters, announcements, publications, and website content should be preserved separately from the platforms on which they were shared.

Final versions of publications and communications materials may provide valuable documentation of a club's public presence and activities over time.

Archival and Historical Records

Archival and historical records are materials retained because they help document the history of the club and may have long-term research, educational, interpretive, or commemorative value.

Examples may include:

- Historical photographs
- Scrapbooks and albums
- Trophies and artifacts
- Historical correspondence
- Anniversary publications
- Oral histories
- Regatta programs
- Significant audiovisual recordings

- Records documenting major events or organizational milestones

Historical value is not determined solely by age or rarity. Materials may be significant because they document an important event, individual, period of change, or aspect of club culture. Records of women's rowing, junior programs, community outreach, facility improvements, accessibility initiatives, environmental events, and other developments may become increasingly valuable over time.

Not every historical record will be included in the Rowing History Project, but records in this category are often strong candidates for inventorying and long-term preservation.

5. Retention & Disposition

Retention guidelines help clubs make consistent decisions about how long records should be kept. Records can often be managed in broad groups based on their function and long-term value rather than reviewed individually.

The retention periods in this guide are general recommendations. Individual clubs may have legal, financial, insurance, grant-related, or institutional requirements that differ from these recommendations. When such requirements exist, they should take precedence.

When you are unsure whether a record has long-term value, retain it temporarily until it can be reviewed more carefully.

Using the Retention Table

The table below provides recommended retention periods for common club records.

In general:

- **Permanent** indicates records with ongoing administrative, legal, financial, or historical value.
- **Active + X years** indicates records that should be kept while actively used and for the specified period afterward.
- **Until superseded** indicates records that should be kept until replaced by a newer version.
- **Selective permanent retention** indicates records that should be reviewed for long-term historical value before disposition.

Not every record within a category will have the same value. Clubs should use judgment when applying these recommendations and consider whether records document significant events, decisions, programs, individuals, or aspects of club history. **See Appendix A for a Sample Records Retention Schedule.**

When Records Reach the End of Their Retention Period

When records reach the end of their retention period, they should be reviewed before they are destroyed. Consider:

- Whether the records are still needed for operational purposes
- Whether retention requirements have been met
- Whether the records contain legal, financial, or administrative information that may still be needed
- Whether the records may have historical value
- Whether duplicate copies exist elsewhere

When you are unsure whether a record has continuing value, retain it temporarily until it can be reviewed more carefully.

Destruction of Records

Records that have reached the end of their retention period and do not have continuing value may be destroyed. Examples include duplicate copies, outdated drafts, routine administrative files that no longer serve a purpose, and temporary notes or working documents.

Records containing sensitive personal, financial, or confidential information should be disposed of appropriately. This may include shredding paper records or securely deleting digital files.

Permanent Retention & Historical Stewardship

Some records should be retained permanently because they have continuing administrative, legal, financial, or historical value. Records that are no longer needed for day-to-day operations may also warrant permanent retention because of their historical significance.

Historical materials may be transferred to a club archive, historical committee, or designated custodian, or documented through the Rowing History Project. These may include historical photographs, scrapbooks and albums, regatta programs, oral histories,

historical correspondence, and materials documenting significant events, people, or milestones.

6. Managing Born-Digital Records

Many clubs now create far more digital records than paper records. Meeting minutes, photographs, newsletters, financial records, event planning materials, websites, and correspondence may exist entirely in digital form.

Digital records can be easy to duplicate, share, and store, but they can also be vulnerable to accidental loss. Files may become inaccessible because of hardware failure, accidental deletion, account changes, damaged storage media, or loss of access to shared systems. Simple, consistent practices can help keep important records organized and accessible over time.

Organization

Whenever possible, organizational records should be stored in shared locations rather than on individual devices.

Examples of shared storage may include:

- Shared cloud storage platforms
- Shared network drives
- Club-managed file repositories
- Shared organizational email accounts

Records stored only on a personal laptop, phone, or individual cloud account may become inaccessible if a device fails, an account is closed, or responsibilities change.

A simple and consistent folder structure can make records easier to locate and maintain. Organizing records by function, such as Governance, Financial, Membership, Programs, and Historical Materials, is often more effective than organizing them by format. **See Appendix E for a Sample Folder Structure.**

Basic documentation, such as a file listing, folder description, or spreadsheet inventory, can help clubs understand what records exist, where they are stored, and who is responsible for them.

When organizing existing records, work with existing structures when practical rather than reorganizing everything at once. Make changes gradually, document them clearly, and use folder structures that future volunteers and leadership can understand.

File Naming

Consistent file names make records easier to identify, search, and manage. File names should be clear and descriptive.

For example:

- 2026-01-15_BoardMinutes.pdf
- 2026_Budget_Aproved.xlsx
- 2025_RegattaProgram.pdf
- 2024_AnnualReport.pdf

Avoid generic file names such as:

- Final.docx
- New Version.pdf
- Minutes Revised Again.docx

Including dates in file names can help maintain chronological order and distinguish between related records.

Version Control

Digital records may go through multiple drafts before they are finalized. When practical:

- Identify final versions clearly
- Retain drafts only when they serve a specific purpose
- Avoid maintaining unnecessary duplicate versions
- Ensure that current versions can be easily identified

For example, a committee may create several drafts of a policy before approving a final version. Earlier drafts may no longer be needed unless they document a significant decision-making process.

Email as a Record

Email used to conduct club business, make decisions, or document important activities may itself be a record. Important messages should not remain solely in individual inboxes if they provide the primary documentation of a decision, agreement, or activity.

Examples may include:

- Official decisions or approvals
- Significant correspondence
- Contracts or agreements transmitted by email
- Communications documenting important activities or events

Routine scheduling messages, reminders, and temporary communications generally do not require long-term retention.

When important business is conducted by email, retain those messages or transfer key information into a shared organizational recordkeeping system.

Storage and Access

Important records should be accessible to current club leadership and other authorized users. When possible:

- Ensure that more than one appropriate person can access important records
- Limit editing access when needed
- Review access during leadership transitions
- Protect sensitive financial, membership, and personal information

Avoid relying on a single individual, device, or account for access to important records.

Backups

Creating multiple copies of important digital records is one of the simplest ways to reduce the risk of loss. Cloud storage can be useful for maintaining and sharing records, but it should not always be the only copy of important files.

A commonly recommended approach is the **3-2-1 backup strategy**:

- Maintain at least three copies of important files
- Store copies on at least two different types of storage media

- Keep at least one copy in a separate location

For example, a club might maintain files in shared cloud storage, keep a copy on an external hard drive, and store an additional backup in another physical location.

The 3-2-1 approach is a goal rather than a requirement. Even one additional copy of important records is an improvement over having a single copy.

The Rowing History Project has developed separate guidance on creating offline backups of digital records. Clubs interested in establishing a more formal backup routine may wish to consult that resource.

Long-Term Preservation

Digital preservation helps ensure that important records remain accessible and understandable over time. Digital files depend on technology to be viewed and used, and changes in software, hardware, storage systems, and online services can eventually make files difficult to access.

Digital files are also more useful when their context is preserved. When practical, retain information that helps explain who created a record, when it was created, and why it was important

Digital Photographs

Digital photographs can become important historical records. Images documenting races, facilities, volunteers, club events, renovations, equipment, and everyday activities may provide valuable documentation of club history. When practical, preserve original image files rather than relying solely on copies posted to websites or social media.

For photographs, scanned materials, and other image-based records, it can be useful to distinguish between **preservation files** and **access files**. Preservation files are high-quality versions retained for long-term storage and future use, while access files are smaller versions created for sharing or routine reference.

Most clubs do not need to create preservation-quality files for every image. When digitizing historical materials or preserving significant photographs, retain the highest-quality version available.

Websites & Social Media

Websites and social media content can change or disappear without notice. Consider preserving selected content that documents significant events, milestones, programs,

facilities, or aspects of club history rather than relying on the online platform as the only copy.

Preferred File Formats

When possible, retain records in widely used, well-supported file formats. Choosing stable formats for new projects can help reduce future preservation challenges.

Examples include:

- **PDF** for finalized documents
- **TIFF** for preservation copies of digitized photographs and scanned materials
- **JPEG** for access and sharing copies of images
- **WAV** for preservation copies of audio recordings
- **MP4** for many audiovisual access and distribution needs

Clubs do not need to convert all existing files. When creating new digital records or digitizing historical materials, selecting commonly used and well-supported formats can improve long-term accessibility.

When original or high-quality files are available, retain them. Original digital photographs, scans, and other source files may have greater long-term value than compressed or edited copies created for sharing online.

Use the Digital Records Self-Assessment in Appendix D to review your club's current practices and identify areas for improvement.

7. Archival Records & the RHP Inventory

The Rowing History Project (RHP) helps participating clubs identify, document, and preserve materials that contribute to the history of rowing organizations and the broader rowing community.

Not every record maintained by a club belongs in the RHP inventory. When identifying materials for inventorying, prioritize items that document the club's history, activities, membership, people, events, and traditions.

Historical materials may exist in paper, digital, audiovisual, or three-dimensional formats. The purpose of inventorying is not to determine monetary value or create detailed

archival descriptions, but to create a basic record of what exists and help clubs better understand, manage, and preserve their historical materials.

What Should Be Included

Materials appropriate for inventorying often include:

- Historical photographs
- Photograph albums and scrapbooks
- Board and committee minute books
- Newsletters and publications
- Regatta records and programs
- Club histories and anniversary materials
- Oral histories
- Historical correspondence
- Audiovisual materials
- Trophies, artifacts, and memorabilia
- Records documenting significant events, milestones, facilities, or individuals

Historical value is not determined solely by age. Materials may be significant because they document an important event, person, tradition, program, facility, or period of change within the organization.

What Usually Does Not Need to Be Included

The RHP inventory generally focuses on historical materials rather than routine operational records.

Materials that often do not require inventorying include:

- Duplicate copies of records
- Routine financial paperwork
- Temporary working files
- Draft documents
- Current administrative records with no long-term historical value

- Blank forms and reference materials
- Routine scheduling information

Some of these records may still need to be retained for administrative purposes even if they do not warrant historical inventorying.

If you are unsure whether something should be included, make a note and consult the RHP team rather than excluding it automatically.

Records management and inventorying support one another. Good records management makes it easier to locate and identify materials with historical value, while inventorying may reveal materials that need improved storage, preservation, digitization, or documentation.

8. Getting Started

Records management does not need to be implemented all at once. Begin with the records and practices that need the most attention, and make practical improvements over time.

Start Where You Are

Begin by understanding what records currently exist and where they are located.

Questions to consider include:

- What records does the club currently maintain?
- Where are records stored?
- Who has responsibility for them?
- Are important records accessible to current leadership?
- Are historical materials located throughout the organization?

Creating a basic inventory or list of record locations can be a valuable first step. **The Records Location Inventory Worksheet in Appendix B can be used for this purpose.**

Prioritize Important Records

Not every record requires immediate attention. Focus first on records that are:

- Essential to current operations

- Required for legal or financial purposes
- At risk of loss or damage
- Historically significant
- Maintained by a single individual without shared access

Establish Shared Access

Make sure important records are not accessible to only one person. When practical:

- Move important records to shared storage locations
- Ensure more than one person has access to key records
- Document where records are stored
- Establish basic procedures for transferring records during leadership changes

Develop Consistent Practices

Simple, consistent practices can improve records management substantially, including:

- Use consistent file names
- Organize records into logical folders
- Follow basic retention guidelines
- Create backups of important records
- Identify historical materials for long-term preservation

Review & Improve Over Time

Records management is an ongoing process. As needs change, review how records are organized, stored, retained, and preserved, and make improvements when needed.

Use Available Resources

The Rowing History Project provides additional guidance and resources related to inventorying, digitization, digital preservation, collections care, and historical stewardship. When questions arise, document uncertainties and seek guidance rather than making assumptions about records that may have long-term value.

Appendix A. Sample Records Retention Schedule

This appendix may be adapted by individual clubs to reflect local requirements, organizational needs, or existing policies.

Record Category	Record Type	Retention Period	Notes
Governance	Board minutes, meeting minutes	Permanent	Core record of organizational decision-making
	Bylaws and governance documents	Permanent	Keep current and historical versions
	Policies and procedures	Until superseded	Retain older versions briefly for reference
Financial	Annual financial statements, audits	Permanent	High-level financial history
	Tax filings (e.g., IRS Form 990)	Permanent	Legal and historical value
	Budgets	7 years; selective permanent retention	Consider retaining approved annual budgets permanently
	Invoices, receipts, expense records	7 years	Standard nonprofit practice
	Payroll records	7 years	Confirm applicable legal requirements

Record Category	Record Type	Retention Period	Notes
Administrative	General correspondence	2–3 years	Retain longer if tied to important decisions or obligations
	Internal planning documents	3–5 years	Retain significant final planning documents; discard routine drafts when no longer needed
Membership & Operations	Membership lists and records	Active + 3–5 years	Consider privacy and data sensitivity
	Event planning and logistics records	3–5 years	Includes regattas, meetings, and programs
Programs & Activities	Program documentation, reports	3–5 years	Retain longer if historically significant
Media & Communications	Newsletters, publications	Permanent	Keep final versions
	Website and social media content	Selective permanent retention	Consider capturing major milestones or changes
	Photographs and audiovisual materials	Selective permanent retention	Prioritize unique or high-value content
Archival/Historical	Materials documenting club history	Permanent	Includes records with long-term research value

Appendix B. Records Location Inventory Worksheet

Use this worksheet to create a basic inventory of what records exist, where they are stored, and who is responsible for them. Include notes about access, organization, or preservation concerns when helpful.

Record Type	Format	Location	Responsible Person or Group	Notes
Board Minutes	Paper	Office filing cabinet	Secretary	1987-present
Board Minutes	PDF	Google Drive	Secretary	2018-present
Newsletters	PDF	Shared Drive	Communications Chair	Nearly complete run
Historical Photographs	Digital	External hard drive and Google Drive	Historical Committee	Some files unidentified

Appendix C. Leadership Transition Checklist

Before an officer, committee chair, or volunteer leaves their role, review the following as applicable:

Physical Records

- ☐ Transfer paper records to the designated storage location
- ☐ Identify historical materials requiring long-term preservation
- ☐ Label boxes and folders clearly
- ☐ Document storage locations

Digital Records

- ☐ Transfer club records from personal devices or accounts when appropriate
- ☐ Confirm shared drive access
- ☐ Confirm that important files can be located and understood
- ☐ Identify important records requiring retention

Accounts and Access

- ☐ Transfer organizational email access
- ☐ Transfer website access
- ☐ Transfer social media administration privileges
- ☐ Transfer ownership or administrative access to shared cloud storage accounts
- ☐ Update passwords, where appropriate
- ☐ Transfer access to backup locations and backup documentation

Historical Materials

- ☐ Identify photographs, audiovisual materials, and other historical records in your custody

- ☐ Document the locations of historical collections
- ☐ Transfer inventories or other documentation about historical materials that are not maintained through the Rowing History Project

Documentation

- ☐ Provide the successor with relevant procedures and documentation
- ☐ Identify ongoing projects and outstanding responsibilities
- ☐ Share information about storage locations, backups, and key contacts
- ☐ Document any known records management or preservation concerns

Appendix D. Digital Records Self-Assessment

Organization

- ☐ Important records are stored in shared locations
- ☐ Folder structures are understandable
- ☐ Records can be located without relying on one individual

File Naming

- ☐ Consistent file naming conventions are used
- ☐ Dates are included when appropriate
- ☐ Generic file names are avoided

Version Control

- ☐ Final versions are clearly identified
- ☐ Duplicate files are minimized
- ☐ Drafts and obsolete versions are removed when no longer needed

Access

- ☐ Multiple individuals have access to critical records
- ☐ Leadership transitions include transfer of access
- ☐ Sensitive records have appropriate restrictions

Backups

- ☐ Important records are backed up
- ☐ Backup locations are documented
- ☐ Backups are reviewed periodically

- ☐ Multiple copies of critical records exist

Long-Term Preservation

- ☐ Historical photographs and audiovisual materials have been identified
- ☐ Significant digital records are retained in high-quality formats when available
- ☐ Original files are retained when practical rather than relying solely on compressed or shared copies
- ☐ Important website and social media content has been considered for preservation
- ☐ Materials documented through the RHP inventory receive appropriate long-term stewardship

Appendix E. Sample Folder Structure

This example is intended only as a starting point. Clubs should adapt folder structures to fit their own activities, organizational needs, and existing recordkeeping practices.

Club Records

- Governance
 - Board Minutes
 - Committee Minutes
 - Bylaws
 - Policies and Procedures
 - Strategic Planning
- Financial
 - Budgets
 - Financial Statements
 - Tax Records
 - Grants and Fundraising
- Administrative
 - Correspondence
 - Planning
 - Internal Reports
 - Vendor Information
- Membership & Operations
 - Membership Lists
 - Registration Forms
 - Volunteer Records
 - Equipment and Facilities
 - Safety Documentation
- Programs and Activities
 - Regattas
 - Youth Programs
 - Events
 - Outreach Activities
- Communications
 - Newsletters
 - Publications
 - Website Content
 - Social Media Content

- Historical Materials
 - Photographs
 - Audiovisual Materials
 - Oral Histories
 - Scrapbooks and Albums
 - Club History