

# RECOMMENDATIONS for Record Retention and Policies

- Implementation of the Record Retention Spreadsheet.
- ALL policies be done in the same format. See Policy Template
- Implement CB & P Committee's "Policy on Policies" that includes the use of the Record Retention Spreadsheet for all CFP documents.
- Dating of all documents done in the same format as on the Policy Template.
  - All "new" documents of every kind be dated with Board approval date.
  - All "existing" documents of every kind be dated with "revised" date.
- Discard existing out dated "Record Retention Policy" and "CFP Audit Policy" as the content has been incorporated in the Record Retention Spreadsheet.
- Establish a frequency for reviewing all non-governing policies.

## WEBSITE RECOMMENDATIONS AS IT RELATES TO RECORD RETENTION

- An "archive" option could be added on the CFP website for access to documents that need to be referenced from the past.
- Review how many hits existing "older, non-revised" content documents are receiving on the website and use that information to determine if the document remains on the website at all or gets placed on the Archive tab.
  - If our website configuration cannot count hits, then every 10 yr. review website Information, including Retired Committees' work, to verify that the information is current and relevant. The Publications Committee could perform this task. Potential outcomes: submission of an Issue for a Council Committee to be created to update a document; the document could be removed from our website if outdated.
  - If our website configuration cannot count hits, revision of the website should be considered.
  - Consideration for providing a designated individual with the only task being CFP webmaster.
  - Consideration for re-designing the CFP website to help accommodate these recommendations.
- Review of website links on a biennial basis.