

APPENDIX A – KEY TERMS

Administrator: The Administrator will be a designated person on the Tech Committee, under the supervision of the COMGA Board. The Administrator maintains the Gmail account passwords and ensures that timely updates are made when positions change within the chapter. The Administrator reviews documents periodically to verify suitability for upload and location of file storage. If any policy changes need to be made, the Administrator will notify the Board.

Flickr: Flickr is a storage, organization, and sharing tool for photos and videos. It allows users to upload and organize collections of photos and videos all in one place, so they can easily access and share them. COMGA uses this platform to photographically document the Chapter activities.

Google Workspace: Google Workspace (<https://workspace.google.com/>) is an application collection which provides email and storage accounts for multiple users under the gocomga.com domain.

- Email addresses, along with “Drive” storage (Google’s cloud storage), are set up for each Board position and Chapter Project Coordinator as Users (e.g., president@gocomga.com), to allow email communication to the public and committees without having to use personal or generic email accounts. This provides an easy transition for changes in the Board and the projects and to maintain continuity in our communications and recordkeeping.

- “Drive” is an application within Google Workspace that provides a secure place for each User to store electronic files such as documents, spreadsheets, and presentations; these files can be shared with others as designated by the User, i.e., owner, of the files.

Tech Committee: The Tech Committee is composed of certified Master Gardeners who have knowledge and experience with a variety of computer systems and apps. The Administrator is a member of the Tech Committee. Qualifications for being a part of the Committee are determined by the committee itself.

Users: In Google Workspace, each Board member and Project Coordinator will be assigned a unique email address with corresponding Drive storage. The documents stored on each User’s Drive will be organized consistently across all positions and projects, following the process for document approval and upload into the correct locations.

Zoom/Zoom Webinar: Zoom is a cloud-based video communications app that allows COMGA to set up virtual video and audio conferencing, webinars, live chats, screen-sharing, and other collaborative capabilities. COMGA currently uses this platform for monthly Chapter meetings, community education webinars and other group or committee meetings.

CENTRAL OREGON MASTER GARDENER ASSOCIATION - POLICIES & PROCEDURES

APPENDIX B - RECORD RETENTION SCHEDULE

| TYPE OF DOCUMENT | MINIMUM RETENTION | REQUIREMENT PAPER OR ELECTRONIC |
|---|-------------------|---------------------------------|
| OMGA Articles of Incorporation, COMGA Bylaws, COMGA book, Articles of Association & related Policies and Procedures | Permanent | Both |
| Tax-exemption documents, application for tax exemption, IRS determination & related documents | Permanent | Both |
| Annual Information Returns (IRS Forms 1099 etc.) | 7 years | Both |
| Meeting/Board documents, including agendas, minutes, related and necessary documents | Permanent | Both |
| Year-end financial statements | Permanent | Both |
| Treasurer's reports, periodic financial records, PayPal data | 3 years | Both |
| Bank statements, canceled checks, check registers, investment statements and related documents | 7 years | Paper |
| Education Awards applications | 3 years | Electronic |
| Membership rosters | 5 years | Electronic |
| Contracts (e.g., for use of buildings for Spring Seminar, Plant Sales, etc.) | 7 years | Both |
| Correspondence (general) | 2 years | Electronic |
| Correspondence (legal and important matters) | Permanently | Both |
| Correspondence (with customers and vendors) | 2 years | Electronic |
| Inventory records for products, materials, and supplies owned by COMGA | 3 years | Both |
| Invoices (to customers, from vendors) | 7 years | Both |
| OMGA Reports and Rosters | 3 years | Electronic |

Amended: January 20, 2007
 Amended: October 17, 2009
 Amended: March 19, 2011
 Amended: May 2, 2013
 Amended: September 7, 2017
 Amended: November 2, 2017
 Amended: October 3, 2019
 Amended: September 3, 2020
 Amended: September 2, 2021
 Amended: January 6, 2022
 Amended: April 6, 2023
 Amended: May 4, 2023
 Amended: November 2, 2023
 Amended: February 1, 2024
 Amended: March 7, 2024
 Amended: May 2, 2024