

# Hearts on Fire: Fellowship of the United Methodist Spiritual Directors and Retreat Leaders (FUMSDRL)

## RECORDKEEPING GUIDELINES

### **Purpose**

The purpose of this policy is to outline what records will be kept and how those records will be kept.

### **Organization's Intent**

It is the intent of this organization to maintain records that are relevant and material to the proper administration of its financial and programmatic activities. Those records shall include, but not be limited to:

- Written policies, procedures, and guidelines that address operational issues such as the by-laws and the vision, mission, values statement;
- Written financial policies, procedures, and guidelines such as accounting procedures and budget;
- Formal accounting records such as check registers, journals, and general ledgers;
- Supporting documentation such as pre-numbered receipts, invoices, and contracts, which support the accounting records;
- Budgets with supporting documentation such as budget requests and approval notifications;
- Board minutes.

### **Storage of Records**

The following documents will be maintained under the "About" tab of the FUMSDRL website:

- Theological Foundation, Vision, Mission, Guiding Values - under "Vision"
- By-laws - under "By-laws"
- Policies and Guidelines - under "Policies and Guidelines"

Board minutes and other relevant documents will be maintained in Google Docs.

Financial documents will be maintained in Quickbooks.

### **Access to Records**

A FUMSDRL member may access Board minutes and financial documents by sending a written request to the Chair of the Board of Directors.

### **Review of these Guidelines**

These guidelines will be reviewed and / or revised by the Board as needed or at least every 2 years.

Approved by the Board of Directors, June 16, 2017

Amended and approved by the Board, July 30, 2019

Amended and approved by the Board, Sept 10, 2019