

8. TRANSPARENCY AND RECORDS POLICY

Records published routinely

- Certificate of Formation, bylaws, policies, and amendments.
- Meeting calendar, notices, agendas, draft minutes, and approved minutes.
- Board resolutions and official position statements.
- Annual budget, quarterly financial reports, annual financial statements, and required IRS filings.
- Names and terms of directors and officers.
- Annual conflict-of-interest compliance statement and disclosures relevant to official action, with private information redacted.
- Election rules, candidate statements, voter-eligibility deadlines, certified totals, and challenge decisions.
- Substantive research reports, public-records indexes, and primary documents relied on for official advocacy when lawful to publish.

Records not published publicly

- Member home addresses, private email addresses, telephone numbers, and dates of birth.
- Individual ballot choices or authentication credentials.
- Bank account and payment-card numbers.
- Attorney-client privileged communications and attorney work product.
- Sensitive personnel, whistleblower, security, and litigation information.
- Copyrighted or legally restricted materials that the Corporation lacks authority to republish.

Member inspection requests

A member may request a nonconfidential record by identifying it with reasonable specificity and stating a proper organizational purpose when required by law. The Secretary should acknowledge the request within five business days and provide the record, a reasonable production date, or a written explanation.

Document integrity

Published records shall identify draft status, approval date, corrections, redactions, and source. Documents shall not be selectively edited in a manner that materially changes their meaning. Superseded versions shall be retained when necessary to understand the record.

Retention schedule

Record category	Minimum retention
Certificate, bylaws, amendments, minutes, major resolutions, tax-exemption records	Permanent
Annual financial statements, tax returns, audits/reviews	Permanent
Bank statements, receipts, invoices, contracts, grant records	7 years after applicable period or termination
Election records and voter certifications	At least 4 years
Membership eligibility records	Duration of membership plus 3 years
Routine administrative correspondence	3 years unless significant
Litigation, investigations, or preservation notices	Until written release by counsel and applicable periods expire