

Master Data Files Rules and Protocol

- The purpose of the Master Data Files (MDF) is to **capture** and **maintain** organizational records and information in Office 365 cloud storage. Your successors should be able to access important job information from your MDF records.
- The MDF is organized to make accessing information simple and intuitive by filing documents by both year and topic. Thus, the same documents may be found in various folders throughout the MDF.
- Most documents in the MDF should be uploaded in final form, rather than in draft or “working” copy format. Active spreadsheets that are consistently being updated are an exception.
- Working files should be kept in individual One Drive files, not the Master Data Files. Move completed files to the appropriate MDF.
- Files on the MDF should **not** be deleted as they are intended to be our institutional memory and records. With some exceptions, only MDF admins can delete files and folders.
- MDF information is available to all members, but training is required before entering information into the MDF.
- The MDF specialist will upload material to the MDF for members upon request. Please contact Ana Facelli 801-792-7493.
- Photos should be uploaded by year, topic, and/or if appropriate, program or committee.
- Board members and other committee chairmen should update the following at the end of each year:
 - Updated job description, if applicable
 - Updated contracts or agreements
 - New or revised forms
 - Yearly committee budgets
 - Important documents produced by your committee during the current fiscal year
 - Board reports, especially the final Board report showing your budget and expenses for the year
 - Photos of your committee members doing committee work; program photos
 - End of Year President's Report for your committee
 - Timeline of yearly activities (formerly the “Calendar” file)

- Vendor list, documents, and information about what each does
- Testimonials from members and those we serve
- Any other information that would be helpful for those who follow you in your position.