**Document Retention Policy**

To [Organization Team],

Stating the **"Record Retention and Destruction Policy"** for [Insert Name of Organization]. This policy has been established to ensure the proper protection, maintenance, and timely disposal of records and documents, both physical and electronic, within our organization. By adhering to this policy, we aim to maintain organized and consistent record retention practices, comply with legal requirements, and efficiently utilize our resources.

**Policy Administrator:**

The policy will be overseen and administered by the designated Policy Administrator, [Insert Title of Policy Administrator]. The Administrator's responsibilities include maintaining the Record Retention Schedule and ensuring strict adherence to local, state, and federal laws concerning record management.

**Suspension of Record Disposal:**

In situations involving litigation, claims, or governmental investigations, we shall suspend any document disposal activities until further notice from the Administrator. This measure ensures that relevant records are retained and available when required for legal purposes.

**Applicability:**

This policy applies to all physical records generated during the course of our organization's operations, as well as electronic documents such as PDF files and Microsoft Office files.

**Record Retention Schedule:**

As a crucial aspect of this policy, we have included an Appendix A, which outlines various record categories and their corresponding retention periods. These categories encompass a wide range of areas, including but not limited to:

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| --- | --- |
| 1. Accounting and Finance | [Retention Period] |
| 1. Contracts | [Retention Period] |
| 1. Corporate Records | [Retention Period] |
| 1. Correspondence & Internal Memoranda | [Retention Period] |
| 1. Electronic Documents | [Retention Period] |
| 1. Grant Records | [Retention Period] |
| 1. Insurance Records | [Retention Period] |
| 1. Legal Files and Papers | [Retention Period] |
| 1. Personnel Records | [Retention Period] |
| 1. Tax Records | [Retention Period] |
| 1. Contribution Records | [Retention Period] |
| 1. Program and Service Records | [Retention Period] |

**Electronic Documents:**

To ensure comprehensive record management, this policy provides specific guidelines for the retention and disposal of electronic documents, encompassing emails, PDF files, and text/formatted files. Proper handling of electronic records is vital for maintaining data integrity and accessibility.

**Fiscal Sponsor Project Records:**

In particular, we have outlined specific retention periods for records related to fiscal sponsorship agreements. This helps us efficiently manage sponsor projects while maintaining necessary documentation.

**Compliance:**

Adherence to this policy is mandatory for all employees and stakeholders of {Insert Name of Organization}. Failure to comply with these guidelines may result in disciplinary action, as the proper handling of records is essential for the efficient functioning of our organization and ensures we meet our legal obligations.

**Conclusion:**

Our **"Record Retention and Destruction Policy"** forms the backbone of our commitment to maintaining accurate, organized, and secure records. By adhering to these guidelines, we protect the interests of our organization, our stakeholders, and the individuals we serve. If you have any questions or need further clarification, please don't hesitate to contact the Policy Administrator.

Thank you for your cooperation in implementing this important policy.

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| --- | --- | --- |
| [Your Name] | [Your Title/Position] | [Insert Name of Organization] |