**Document Retention Policy**

**[Your Organization's Name]**

**Purpose:** The Record Retention and Destruction Policy of [Your Organization's Name] aims to ensure the proper protection, maintenance, and timely disposal of records and documents in accordance with legal and regulatory requirements. This policy applies to all physical and electronic records generated during the operation of the organization.

**Administration:** The policy is administered by the [Insert Title of Policy Administrator], who is responsible for maintaining the Record Retention Schedule and ensuring compliance with local, state, and federal laws. Any questions or concerns related to this policy should be directed to the Policy Administrator.

**Suspension of Record Disposal:** In the event of litigation, claims, or governmental investigations, disposal of documents shall be suspended until further notice from the Policy Administrator. It is essential to preserve all relevant records during such periods to ensure legal compliance and cooperation with any ongoing inquiries.

**Applicability:** This policy applies to all employees, contractors, and personnel of [Your Organization's Name], who are responsible for generating, maintaining, or handling records, both physical and electronic. The policy includes, but is not limited to, electronic documents such as email, web files, PDFs, Microsoft Office files, and various formatted files.

**Record Retention Schedule:** The Record Retention Schedule, detailed in **Appendix A**, outlines various record categories and their corresponding retention periods. These categories include, but are not limited to:

* Accounting and Finance Records
* Contracts and Agreements
* Corporate Records
* Correspondence and Internal Memoranda
* Grant Records
* Insurance Records
* Legal Files and Papers
* Personnel Records
* Tax Records
* Electronic Documents (Emails, PDFs, Text/Formatted Files)

The retention periods specified in the schedule are determined based on legal requirements, operational needs, and historical significance. It is the responsibility of each department or individual handling records to adhere to the retention periods specified in Appendix A.

**Electronic Documents:** Electronic documents, including emails, PDF files, and text/formatted files, must be retained and managed in accordance with the Record Retention Schedule. All employees are expected to organize and store electronic documents in a secure and accessible manner. The use of authorized document management systems is encouraged for better organization and compliance.

**Record Destruction:** Upon reaching the end of their designated retention periods, physical records and electronic documents must be promptly and securely destroyed. The destruction process should render the documents unreadable and unrecoverable to protect sensitive information and ensure compliance with data privacy regulations.

**Compliance Failure:** to comply with this Record Retention and Destruction Policy may result in disciplinary actions, as well as legal and financial consequences for [Your Organization's Name]. All employees and personnel are expected to cooperate fully with the Policy Administrator and any authorized auditing or investigating bodies to ensure adherence to this policy.

**Policy Review:** This policy will be reviewed and updated as necessary to reflect changes in laws, regulations, and organizational needs. Any proposed amendments to this policy should be submitted to the Policy Administrator for evaluation and approval.

Document History [Insert a table or section to record policy updates, version numbers, and approval dates.]

By adhering to this Record Retention and Destruction Policy, [Your Organization's Name] ensures the proper management of records, protects sensitive information, and demonstrates commitment to legal and regulatory compliance.

**Approved by:** [Name and Title of Executive or Board]

**Date:** [Insert Approval Date]

**Appendix A:** Record Retention Schedule [Provide a detailed list of record categories and their corresponding retention periods, as mentioned in key point 5 above.]