



POLICY

Drafted by	J. Briscoe	Approved by Board on	June 2018
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Retention and Disposal of Files and Electronic Records

Purpose

To outline Valley FM's (VFM) retention and disposal requirements of VFM files and electronic records.

Policy

All material, in paper copy, electronic or any other format that is created by volunteers in the course of their engagement with VFM is the property of VFM.

All documents and electronic records that contain private and confidential information about consumers and volunteers or VFM as an organisation, shall be retained in locked filing and storage cabinets with access only by the Station Manager/President, Secretary and Director Administration.

No information or any form of media (thumb drive etc) relating to VFM work may be taken from the premises without the prior permission of the Station Manager/President.

All VFM records shall be retained according to the legal requirements for that record. Records include all documentation retained in hard copy and electronically in relation to VFM's corporate governance requirements.

Archived documents will only be accessible to Directors with the delegated authority to access the record, or to others as required by law.

Tax records include, but may not be limited to, documents concerning expenses, proof of deductions, business costs, accounting procedures and other documents concerning VFM revenues. Tax records will be retained for seven years from the date of filing the applicable return.

Employment Records are not always applicable to VFM as a staff position would only occur as a result of a successful grant submission. When relevant, all records associated with the employment and service of an individual staff member will be retained for seven years.

Member Registers will be kept for seven years.

Board Proceedings/Minutes. Minutes of all official meetings (AGM, SGM and Board meetings) will be retained in perpetuity in VFM's minutes' folder. A clean copy of all VFM Board and board materials should be kept for no less than seven years.

VFM Policy and Protocol Manuals are permanently retained in hard copy for current policies and electronically for historical policies/protocol. Copies of all community services announcements are also retained.

Legal documents including copies of all contracts entered into by VFM e.g. funding agreements, leases, licence applications, grants and other legal documents will be retained for 10 years.

E-mails, including documents that are sent to or from VFM as attachments that need to be saved should be printed in hard copy and kept in the appropriate file.

The following retention timeframes are to be applied:

- Administrative correspondence (4 years) includes, though is not limited to, confidential management information, legal information and project-related correspondence
- Fiscal correspondence - 7 years - includes all information related to VFM revenue and expense
- General correspondence - 1 year - includes information relating to VFM operational decisions
- Ephemeral correspondence - retain until read, then destroy - includes personal email, emails dealing with the work of the day and emails containing information outdated by events, and
- Back up is to be to USB drives.

Valley FM Compliance Obligations

The Board is responsible for the development, implementation, operation and review of this policy. Compliance with the policy is also the responsibility of all Board Members.

Legislation Framework

N/A

References