



## **Records Retention, Destruction and Privacy Policy**

This Records Retention, Destruction and Privacy Policy of the Alabama SHRM State Council (ALSHRM) sets forth the record retention responsibilities of the members of the board of directors, committee members, volunteers and others for the maintenance, destruction and privacy of ALSHRM's records.

1. **Records Retention and Destruction.** It is ALSHRM's policy to maintain complete and accurate records. Members of the board of directors, committee members, volunteers and others contracting with ALSHRM shall transfer to the appropriate party all paper and electronic records of ALSHRM for the proper maintenance. The records shall be maintained in accordance with the schedule below.
2. **Privacy of Records.** It is ALSHRM's policy to release information related to members on a need to know basis and upon the request of the affected party. All confidential records will have limited access and will be securely stored. Additionally, it is ALSHRM's policy not to request for individuals to provide social security numbers. Demographic information provided by individuals is optional and individuals requesting for a reasonable accommodation is accessible on a need to know basis.
3. **Conversion of Records to Electronic Form.** Paper records may be converted to electronic form for ease of access and storage.
4. **Responsibility for Administration of Policy.** The state council director shall be responsible for administering this policy. The state council secretary shall retain ALSHRM's historical documents, including meeting minutes. The state council business manager shall retain financial documents and the Certification Director shall retain all conference continuing education documents.

### **Records Retention Period**

Audited financial statements	Permanent records
Articles of Incorporation & Bylaws	Permanent records
Meeting minutes	Permanent records
IRS Documents	7 years
Continuing education documents	7 years
Accounts receivable and payable ledgers	7 years
Bank statements & deposit records	7 years
Contracts	7 years