



Retention and Destruction Plan Foster Your Future

I. Purpose: The purpose of this Retention and Destruction Plan (Plan) is to establish and maintain clear procedures for managing the retention, storage, and destruction of documents and records by Foster Your Future (FYF). This Plan ensures that the FYF complies with legal, regulatory, and contractual obligations related to document retention and destruction, while protecting sensitive information, especially regarding foster adults.

II. Scope: This Plan applies to all records generated or received by FYF, including paper documents, electronic records, and any other form of information that is part of the Organization's operations. The Plan covers the retention period and procedures for proper destruction of records when not needed.

III. Retention of Records:

Categories of Records: FYF's records are categorized based on their type and importance. Examples of categories include, but are not limited to:

Foster Adult Records: Includes intake forms, care plans, medical histories, other personal information.

Financial Records: Includes accounting records, tax filings, and donor records.

Employment and Volunteer Records: Includes applications, contracts, payroll records, and evaluations.

Corporate Records: Includes board meeting minutes, bylaws, and annual reports.

Program and Activity Records: Reports, event records, and funding documentation.

Retention Periods:

- **Client and Foster Adult Records:** Retain at least **7 years** after the last date of service.
- **Financial Records:** Retain for **7 years**, as required by the IRS and other regulatory bodies.
- **Employment and Volunteer Records:** Retain at least **3 years** following end of employment/service.
- **Corporate and Legal Records:** Retain permanently or for a time relevant to laws and regulations.
- **Program Records:** Retain at least **7 years** after the completion of the program or grant cycle.

IV. Storage and Protection of Records:

Physical Records: Physical records are stored in a secure area, with limited access to authorized personnel. Foster adult records, medical records, and other sensitive documents will be stored electronically with passwords. **Electronic Records:** Electronic records are stored on secure servers with regular backups. Access to sensitive or confidential information will be restricted to authorized personnel through the use of passwords. **Data Protection:** FYF adheres to data protection and privacy regulations to ensure that sensitive personal information is adequately protected throughout its retention period.

V. Destruction of Records:

Destruction Procedures: Once records have reached the end of their retention period and are no longer required for operational, legal, or regulatory purposes, they are securely destroyed.

Physical Records: Shredding or incineration for paper records.

Electronic Records: Secure deletion from all digital storage systems.

Authorized Personnel: Only authorized personnel handle the destruction of documents. Destruction is performed in a manner that ensures all confidential information is irretrievably removed.

VI. Compliance and Accountability

Staff Training: Administrative staff involved sign off on review of FYF Policies and FYF staff are available to review and discuss procedure. **Review and Updates:** This plan is reviewed and updated annually by the Board of Directors or designated personnel.