

LOWER MACUNGIE FIRE DEPARTMENT DOCUMENT RETENTION AND DESTRUCTION POLICY

This **Document Retention and Destruction Policy** of the Lower Macungie Fire Department identifies the record retention responsibilities of staff, volunteers, administrative officers, operations officers, and outsiders for maintaining and documenting the storage and destruction of the Organization's documents and records.

1. **Rules.** The Lower Macungie Fire Department's staff, volunteers, administrative officers, operation officers and outsiders (i.e. independent contractors via agreements with them) are required to honor these rules: (a) paper or electronic documents indicated under the terms for retention below will be transferred and maintained by the Administrative Officers, Operation Officers, Legal or Accounting contractors or their equivalents; (b) all other paper documents will be destroyed after three years; (c) all other electronic documents will be deleted from all individual computers, databases, networks, and back-up storage after one year; and (d) **no paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation.**

2. **Terms of retention.**

- a. **Retain permanently:**

Governance records – Charter and amendments, Bylaws, other organizational documents, governing board and board committee minutes.

Tax records – Filed state and federal tax returns/reports and supporting records, tax exemption determination letter and related correspondence, files related to tax audits.

Intellectual property records – Copyright and trademark registrations and samples of protected works.

Financial records – Audited financial statements, attorney contingent liability letters.

b. Retain for **10 years**:

Pension and benefit records – Pension plan participant/beneficiary records, actuarial reports, related correspondence with government agencies, and supporting records.

Government relations records – State and federal lobbying and political contribution reports and supporting records.

c. Retain for **3 years**:

Employee/employment records – Employee names, addresses, social security numbers, dates of birth, INS I-9, resume/application materials job descriptions, dates of hire and termination/separation, evaluations, compensation information, promotions, transfers, disciplinary matters, time/payroll records, leave/comp time/FMLA, engagement and discharge correspondences, documentation of basis for independent contractor status (retain for all current employees and independent contractors and for 3 years after departure of each individual).

Lease, insurance, and contract/license records – Software license agreements, vendor, hotel, and service agreements, independent contractor agreements, employment agreements, consultant agreements, and all other agreements (retain during the term of the agreement and for 3 years after termination, expiration, non-renewal of each agreement).

d. Retain for **one year**:

All other electronic records, documents and files – Correspondence files, past budgets, bank statements, publications, employee manuals/policies and procedures, survey information.

3. Exceptions. Exceptions to these rules and terms for retention may be granted only by the Lower Macungie Fire Department's Administrative Officers.

Approved On: 3/31/2010