



Document Retention and Destruction Policy, AIDS Service Foundation of Greater Kansas City

Purpose

AIDS Service Foundation of Greater Kansas City (ASF) is committed to responsible document management to ensure compliance with legal, regulatory, and operational requirements. This Document Retention Policy establishes guidelines for retaining and securely disposing of records to protect confidentiality, maintain transparency, and fulfill our mission effectively.

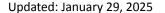
Scope

This policy applies to all employees, board members, volunteers, contractors, and any individuals handling foundation records. It covers physical and electronic documents related to financial records, governance, donor information, grants, and legal matters.

Retention Guidelines

Documents will be retained for the minimum period required by law or operational necessity. Below is a general retention schedule:

Document Type	Retention Period
Governing Documents (Bylaws, Articles of	Permanent
Incorporation, IRS Determination Letter, Board	
Meeting Minutes)	
Tax & Financial Records (IRS Form 990, Audited	7 years
Financial Statements, General Ledgers, Payroll	
Records)	
Grant Records (Proposals, Reports, Funding	7 years after completion
Agreements, Correspondence)	
Contracts & Agreements (Vendor, Partner, Lease	7 years after expiration
Agreements)	
Donor Records (Gift Acknowledgments,	At least 7 years, but can be permanent
Contribution Records)	
Personnel Records (Employee Files, Timesheets,	7 years after separation
Benefits Documents)	
Legal & Compliance Documents (Litigation	Permanent
Records, Insurance Policies, Government Filings)	
Program Records (Research Data, Program	7 years after program completion
Reports, Client Service Records)	
Electronic Communications & Internal Memos	3 years
General Correspondence & Administrative Files	3 years
Marketing & Outreach Materials (Newsletters,	3 years
Annual Reports, Public Statements)	





Document Storage and Security

Documents should be stored in secure physical or electronic formats to protect confidentiality and prevent unauthorized access. Electronic records must be backed up regularly and stored in compliance with data security best practices.

Document Destruction Policy

Documents that have exceeded their retention period will be securely destroyed to protect sensitive information. Paper records should be shredded, and electronic records should be permanently deleted using secure disposal methods.

Litigation Hold: If a legal case, audit, or investigation is pending, all relevant documents must be retained until formally released by legal counsel.

Compliance and Oversight

The Board President (or designated officer) is responsible for enforcing this policy and ensuring compliance.

Board members and staff should review retention schedules annually to ensure proper document management.

Any questions regarding document retention or destruction should be directed to the Board President or the Secretary.

Adopted on: February 17, 2025

Reviewed by: Board of Directors, AIDS Service Foundation of Greater Kansas City