

# Record Keeping Policy

| Policy type      | Year | Approved by                                    |
|------------------|------|--|
| MTSCT Governance | 2022 | Mountains to Sea Conservation Trust – Trustees |

## Introduction

This document provides guidelines for the retention and destruction of data by staff of the Mountains To Sea Conservation Trust (MTSCT).

We recommend that provider organisations adopt these policies, in absence of their own policy.

## Purpose

The purpose of this policy is to ensure that MTSCT maintains its official records in accordance with the requirements of all applicable laws and that official records no longer required are destroyed in a timely manner. This policy provides guidelines for the retention of official documents under ordinary circumstances. It is also for the purpose of aiding staff in understanding their obligations in retaining electronic documents, including emails, PDF documents and all office suited or other formatted files.

## Policy

This policy represents the MTSCT's policy regarding the retention and disposal of records and the retention and disposal of electronic documents. The intent of this policy is that records should be retained only as long as is necessary to meet legislative, fiscal, contractual, administrative and operational requirements. Legal requirements may be set out by legislation such as the Companies Act 1993, the Trust Act 2019, the Tax Administration Act 1994, the Health and Safety at Work Act 2015, the Employment Relations Act 2000 and the Privacy Act 2020.

Staff must ensure that documents for which they are responsible are accurate, complete, and are retained for the periods of time indicated in the schedule in Appendix A, and then disposed of in accordance with this policy.

Documents must be managed and disposed of in a manner appropriate to the sensitivity of the information they contain. It is the responsibility of staff to ensure that this policy is complied with when maintaining and disposing of records. When a document is destroyed (as defined in the policy below), care must be taken to ensure that all personal and confidential information contained therein is permanently and securely destroyed.

## Covered Records

This policy applies to all official records generated in the course of MTSCT's operations, including but not limited to:

- Typed or printed hardcopy documents such as contracts (i.e. school agreements, funding contracts) and registration forms
- Electronic records and documents such as, web files, text files, pdf files.
- Video or digital images.
- Electronically stored information contained on network servers and/or document management systems (such as the Google Drive)

This policy applies to all trustees, employees and contractors of the MTSCT.

## Applicability

This policy applies to all physical records generated in the course of MTSCT's operation, including both original documents and reproductions. It also applies to electronic documents as described above.

## Record Retention Schedule

1. The formal records of the Mountains To Sea Conservation Trust, such as trust deed, agendas, minutes, resolutions and annual reports shall be kept for the lifetime of the trust.
2. Financial records will be kept for 7 years in accordance with IRD guidelines.
3. Other records of the trust will be kept according to the schedule recommended by the Community Toolkit (<http://communitytoolkit.org.nz/good-governance/keeping-records/>) and this policy and/or guidelines (<https://docs.google.com/document/d/17xij7kY55a4Oy77pVQeJe-avgfYmSeaoDcRnmlUczFw/edit>).
4. Consideration should also be given as to whether records are subject to the Privacy Act 2020, the MTSCT Privacy Statement and the Privacy Guidelines for Coordinators.