



APPA Document Retention Policy

|  Adopted by the APPA Board of Directors on September 24, 2026.

APPA Document Retention Policy

I. Purpose

This Document Retention Policy establishes principles and expectations for the retention, maintenance, and disposition of records created or received by APPA in the course of conducting Association business.

The purposes of this policy are to:

- Promote compliance with applicable legal, regulatory, and governance requirements
- Support sound records management and organizational transparency
- Ensure that records are retained for appropriate periods based on operational, legal, fiscal, and historical value
- Reduce risk associated with improper destruction or retention of records
- Provide guidance for the orderly disposition of records that are no longer required

This policy establishes governance-level expectations and does not prescribe detailed operational procedures, which may be maintained separately.

II. Scope and Applicability

This policy applies to all records created, received, or maintained by APPA in connection with its governance, operations, programs, and activities.

This policy applies to Board members, officers, employees, volunteers, and agents acting on behalf of the Association.

Records include documents in any form, including paper, electronic files, emails, databases, images, audio or video recordings, and other media.

This policy applies regardless of storage location, including Association systems, third-party platforms, and records created or maintained on personal devices or accounts when used for Association business.

III. Roles and Responsibilities

The Board of Directors provides oversight of this policy.

The Chief Executive Officer administers and enforces this policy and may establish procedures, guidelines, and retention schedules.

All employees, volunteers, and agents must comply with this policy.

IV. Retention and Destruction Principles

Records are retained based on administrative, legal, fiscal, historical, and operational value.

Electronic records maintained in Association-approved systems constitute the official records of the Association unless otherwise required by law or contract.

Records not subject to legal holds may be destroyed securely once retention requirements are met.

V. Legal Holds and Suspension of Destruction

When litigation, audits, or investigations are anticipated or underway, record destruction must be suspended.

Legal holds supersede all retention schedules and apply to records in all formats and locations.

Normal retention practices may resume when the legal hold is lifted.

VI. Policy Administration and Amendments

This policy is established by the APPA Board of Directors.

The policy shall be reviewed at least every three (3) years.

The Board may amend this policy and delegate authority for administrative updates.

Effective Date. This Document Retention Policy was adopted by the APPA Board of Directors on September 24, 2026.

END OF POLICY