



Data Retention Policy

Policy history

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Policy owner	SONZ Foundation Board of Trustees

Policy

1 Introduction

- 1.1 In the course of carrying out its business activities, the Special Olympics New Zealand Foundation collect information from a wide range of sources. How that data is stored and eventually disposed of is governed by applicable laws New Zealand and influenced by good governance practices.
- 1.2 Special Olympics New Zealand Foundation (SONZ Foundation) has developed this Data Retention Policy (**Policy**) to document its approach to data retention and disposal.
- 1.3 All trustees of SONZ Foundation, any employees or contractors of SONZ Foundation are expected to read, understand, and comply with this Policy.
- 1.4 Where SONZ Foundation engages a third party to provide services for SONZ Foundation, and that third party is involved in the collection, storage, and/or disposal of any data held by SONZ Foundation, the relevant personnel member is responsible for sharing a copy of the Policy with that third party.

2 Definitions

- 2.1 In this Policy, the following terms have the following meanings:

Appendix means the appendix to this Policy.

Data means any Record and Document, and any other thing stored in a database or file system.

Document means a document in form, including any physical or electronic report, article, spreadsheet, presentation, chart, plan, contract, or drawing.

Personal Information has the meaning given in the Privacy Act.

Privacy Act means the Privacy Act 2020.

Record means any piece of information collected or held that records a fact, attribute, or evidence about an event.

3 Purpose

- 3.1 This Policy sets out SONZ Foundation's approach to managing any Data in its possession (including Data containing Personal Information) to ensure that the information is preserved in line with the legislative requirements.

4 Scope

- 4.1 The Policy applies to SONZ Foundation trustees, any employees of SONZ Foundation, and any other person who, with SONZ Foundation's authorisation, has access to any Data collected and/or stored by SONZ Foundation.
- 4.2 All Data collected, created, handled, stored or destroyed by SONZ Foundation falls within the scope of this Policy.

5 Data Collection

- 5.1 Data will be collected in accordance with applicable law.
- 5.2 When collecting Personal Information, SONZ Foundation will clearly disclose to the individual concerned what that Data is being collected for, as required by the Privacy Act. For further information on SONZ Foundation's collection, use, and disclosure of Personal Information, please see SONZ Foundation's Privacy Policy.

6 Data Storage

- 6.1 The Data will be stored by electronic and/or physical means within SONZ's secure network and/or SONZ's secure physical document storage facility at 93 Hutt Park Road, Seaview.
- 6.2 The period for which the Data is to be stored and retained is determined with reference to applicable law and other good governance recommendations (as set out in the Appendix).
- 6.3 However, applicable retention periods can be extended on a case-by-case basis in certain situations:
- 6.3.1 where there is an ongoing need for the Data;
 - 6.3.2 when exercising legal rights in cases of legal action; or
 - 6.3.3 in any other case that the relevant SONZ Foundation trustee ~~manager/officer~~ considers appropriate.

7 Data Destruction

- 7.1 SONZ Foundation will regularly review Data to determine whether it is appropriate to destroy or delete it, having regard to the standard retention period (set out in the Appendix), and the purpose for which such Data was collect, created, or stored.
- 7.2 The method of disposal of Data varies and is dependent on the nature of the Data. Data will be disposed of via deletion, shredding, or otherwise destroying to a degree

that is appropriate, having regard to the value and level of confidentiality associated with such Data:

Data Level	Description	Examples	Disposal Methods
Level I	Data that is the highest security and confidentiality.	Personal records Personal financial information	If in paper form, disposed of as confidential waste (cross-shredded and incinerated). If in electronic form, subject to secure electronic deletion. Note: The SONZ Foundation Board through the Chair is responsible for authorising the destruction should maintain proof of destruction / deletion, where possible.
Level II	May contain confidential information or some sort Personal Information (but not financial information).	Expired agreements General records of personnel / patients / clients	If in paper form, disposed of via an approved confidential disposal firm. If in electronic form, subject to secure electronic deletion.
Level III	Do not contain any confidential information or personal information.	Advertisements, newsletters and catalogues	If in paper form, disposed of strip shredded or disposed of through a recycling company. If in electronic form, electronically deleted.

8 Obligation to report and enforcement of Policy

- 8.1 Any suspicion of a breach of this Policy must be reported immediately to a manager or other relevant supervisor. All instances of suspected breaches of the Policy will be investigated, documented and action taken as appropriate.
- 8.2 Failure to comply with this Policy could result in significant adverse consequences for SONZ Foundation. As a result, non-compliance with this Policy by any trustee, employee, contractor, or third party who has been granted access to Data, may constitutes serious misconduct or breach, which could result in disciplinary proceedings or termination of employment or contract.
- 8.3 SONZ Foundation reserves the right to bring legal action against any person who breaches this Policy.

APPENDIX – STANDARD RETENTION PERIODS

1 Personal Information

Data Type	Retention Period	Notes
Basic Personal Information, such as address, contact information, birth date.	No longer than the purpose for which it was collected allows.	Privacy Act 2020.

2 Operational Records

Data Type	Retention Period	Notes
Material agreements / contracts	6 years after expiry or termination	Held electronically on Sharepoint in the Foundation folder.
Other contracts with suppliers	6 years after expiry or termination	Held electronically on Sharepoint in the Foundation folder.
Accident records and reports	Permanently	Held electronically on Sharepoint in the Foundation folder.

3 Financial Records

Data Type	Retention Period	Notes
Financial Statements	7 years	Financial Reporting Act 1993
Tax information	7 years from the end of the taxable period to which they relate	Tax Administration Act 1994
GST Records	7 years	Goods and Services Tax Act 1985
Company Records	Normally 7 years except for records the Act requires to be kept permanently	As provided in s 189 Companies Act 1993