



Record Retention Policy

Public Interest Experts (PIE)

EIN: 99-1171001

Effective: April 11, 2025

This Record Retention Policy is intended to ensure that Public Interest Experts (PIE) maintains records necessary for compliance with legal and regulatory obligations.

Policy

PIE retains and discards records according to the following general schedule. Records must be retained securely and confidentially, and destroyed in a way that protects sensitive information as outlined in the [Backup and Data Security Policy](#).

Retention Schedule

- Financial Statements: 10 years
- Tax Returns: Permanently
- Personnel Records: 7 years after termination
- Grant Documents: 10 years after completion
- Board Minutes: Permanently
- Contracts: 10 years after expiration

Electronic Records

Electronic records are treated the same as paper records. All backups and storage systems must meet security standards as outlined in the [Backup and Data Security Policy](#).

Compliance

Employees and board members are responsible for understanding and complying with this policy. Questions should be directed to the Executive Director.

8. Review and Amendments

This policy will be reviewed annually by the Board of Directors or designated committee and may be amended as necessary to reflect legal, ethical, or organizational changes.