



Subject: Records Retention Policy

Policy: PCE will retain its records for set periods of time in order to ensure adequate and manageable recordkeeping. Records outside the specified retention periods may be discarded according to the procedures in this policy. Records may be kept in electronic or paper format (or both).

1. Retention periods

<u>Record Type</u>	<u>Retention Period</u>	<u>Sample Descriptions</u>
Executed contracts	10 years after termination	Power supply contracts, contracts with vendors or consultants
Vendor invoices	2 years after contract completion	Vendor invoices for payment
Non-disclosure agreements	In perpetuity	NDA with vendor, employee, Board member or advisor
Board-approved decisions	In perpetuity	Resolutions, meeting minutes, and other items approved at regular or special Board meetings
Board and committee meeting materials	In perpetuity	Agendas, staff reports, and other material provided to Board members for meetings
Board-approved budgets	In perpetuity	Final, approved budgets
Document drafts	30 days after final version is approved	Draft of contracts, programs, RFPs, etc.
General electronic correspondence	2 years	Relevant email correspondence at staff discretion
Customer-specific usage information and data	2 to 10 years, but no longer than reasonably necessary	Electronic information and reporting from Director of Customer Care, customer bill analyses, customer consent for third-party disclosures
Marketing material	2 years after public distribution	Flyers, brochures, electronic ads
General educational or informational material	2 years	Brochures, reports, electronic information
Personnel information	5 to 10 years after employee end date	Offer letter, resume, evaluations

2. Procedures for discarding records

- a.** When records are no longer required to be kept under the requirements above, they may be discarded.
- b.** PCE will undertake a record purge at least every five years, identifying those records that may be discarded. The Office Manager will oversee the purge, in consultation with PCE's legal counsel.
- c.** Records with confidential or sensitive information will be discarded in a secure manner, such that the confidential or sensitive information is no longer viewable or accessible after being discarded.