

GSEIWI Document Retention Guide for Volunteers

During your volunteer service, you may handle personal information of members and caregivers. This may include full name, address, date of birth, email address, phone number and health information. This information should be handled with care and consideration for our members' privacy. Personal information should be used only for the purposes necessary in your volunteer role for activities with GSEIWI and should not be shared with anyone who is not a registered and background checked volunteer with GSEIWI. Personal data should not be shared with any volunteer who does not have a need to know.

Personal data should be retained only as long as necessary to fulfill the purposes for which it was collected. Keeping personal data for longer than necessary can create risks for the privacy and security of our members. Use this guide to determine how long to retain various types of documents, when you should share them, how to store them and when to dispose of them.

Always dispose of paper items securely by shredding or burning. Digital records should be deleted and cleared from computer "recycle bin" or "trash".

Data type		How long to retain	Who should have access	How to store or when to discard
Membership and registration information	Paper membership registration forms	Until membership is processed	GSEIWI council staff	Do not scan, copy or email membership forms if credit card information is provided. Give to council staff as soon as possible for processing. After membership is processed and the individual is shown in your roster, destroy the paper record.
	Troop or Service Unit rosters Includes any lists of members with names, phone numbers, addresses, email addresses, birthdays or other information	1 membership year, or until updated roster is available.	Troop or Service Unit volunteers with need to know for their role	Discard all paper or digital records: • at the beginning of each new membership year (October 1 annually) • when new Girl Scouts are added or leave the troop and you have an updated roster • when the troop disbands
	Event Registration Rosters and Forms	Maximum 1 year	Event volunteers and staff	Destroy when information is no longer needed. Retain for no more than 1 year.

Data type		How long to retain	Who should have access	How to store or when to discard
Health and permissions	Year-long permission and health form	1 membership year, or until updated form is provided by caregivers	Make forms available to all troop volunteers in case of emergency. Share relevant health and safety information about youth members with <i>all volunteers</i> who have shared oversight of members. Examples include: • Food allergies • Names of individuals who are permitted to pick up members from activities • Emergency meds for conditions such as asthma	If a Girl Scout youth or adult is involved in an incident, accident, or experiences an illness, all permissions and health information must be provided to council as part of the reporting process. If a Girl Scout does not have an incident, accident or illness recorded, destroy all forms at the end of membership year. A new Year-long permission and health form should be filled out at the beginning of each membership year for each member. A new permission form for activities should be completed for each outing or event.
	Permission form for activities Includes other permissions, such as Sensitive Issues Permission form, Photo release form	1 membership year		
	Health log Any documentation of health issues or medication distributed during travel or camp	Submit to GSEIWI following the event or activity	• Individuals responsible for administering medications or providing healthcare • GSEIWI staff after the end of the trip or camp.	Provide records to council following the camp or travel experience, then destroy.
	Day Camp Health Form Health documents collected for volunteer-led camp or day camp	Submit to GSEIWI following the event or activity	Share relevant health and safety information about youth members with: • All volunteers who have shared oversight of members during the event • Individuals responsible for administering medications or providing healthcare • GSEIWI staff after the event	Provide all health documents and records to council following the camp, then destroy.
	Day Camp Permission Form Permissions collected for volunteer-led camp or day camp	1 membership year		If a Girl Scout youth or adult is involved in an incident, accident, or experiences an illness, all permissions and health information must be provided to council as part of the reporting process. If a Girl Scout does not have an incident, accident or illness recorded, destroy all forms at the end of membership year.

Data type		How long to retain	Who should have access	How to store or when to discard
Financial records	Troop or Service Unit bank account information Includes account numbers, checkbooks, debit cards	Until the troop is disbanded and account has been closed.	Account signers. For all Girl Scout accounts, GSEIWI requires 2 account signers. Signers must: • Be registered volunteers • Have a current background check • Not be related to each other or members of the same household • Complete GSEIWI troop finance training	Retain in a locked location for as long as the troop is active. Do not grant access to other individuals or members of your household. If leadership of the troop changes, provide relevant information to new leadership. Destroy after the troop has disbanded and account has closed.
	Records of income or expenditure Includes receipts for purchases, bank statements, deposit slips, records of reimbursement	3 membership years	Records should be maintained by both account signers to maintain checks and balances. Records should be open to and shared with any troop member or caregiver for financial transparency.	Retain for 3 full membership years while the troop is active. If the troop disbands, retain all records for at least 1 year after troop account has been closed. Submit a summary of your troop expenses annually by September 30 through the Volunteer Toolkit Finance Tab, then file your expense records in a safe place. In the event of a troop audit, receipts, bank statements and any records of troop expenditure must be submitted to council. Failure to submit records of expenses may result in personal financial liability.
	Product Program Records Includes receipts for product or money turned in	1 year	Troop volunteers and product managers	Retain until product programs are complete the following year, or when the troop disbands.
Other	Other documents which include personal data	Maximum 1 year	Only those who need the information for their role.	Destroy when information is no longer needed. Retain for no more than 1 year.