

# R1. Record Keeping and Retention



Rotary (M)

The Data Protection Act requires that anyone to handling personal information gathered in Youth Exchange does so with great sensitivity and care. Not only do we need to safeguard the documents relating to the student but also those concerned with selecting and appointing host families. To quote the student's application form:

Your information will be shared with Rotary International, the Sending and Hosting Rotary Districts Youth Exchange Organisations and Clubs, your appointed counsellor and host families. It will only be used for official RI business and not sold or shared with other third parties, unless required by law to be released.

Before, during and after an Exchange access to different types of data needs to be confined according to a 'need to know' principle and producing printed copies is discouraged. Any surplus data – of students who did not make it to exchange – should be deleted or shredded according to its form.

It is a condition of Certification that Exchange data shall be stored for an unspecified length of time (there is no Statute of Limitations in the area of Child Protection) and this is best done electronically. Ease of retrieval is vital since it might not be called upon for some time after the year in which the records were created and then be beyond the memory of current Rotarians, so a central system of storage is necessary.

DYEOs are instrumental in setting up the system for the district in time to receive the records which accrue.

## RIBIDYEA Records Storage

Best practice is to accumulate the relevant documents, while 'live', in a folder in which they may be moved directly to storage with easy retrieval

There are three categories to consider: Outbound students, Inbound students, and Adults, principally Host Families and Counsellors, who generate materials in need of retention.

All record folders need to be personalised (Family Name, Given name), together with the Exchange programme concerned and the dates of the actual exchange.

## 1. Record Keeping for Outbound Students

The personalised Outbound Student Records Folder, into which is placed the AF and GF of the outbound student plus any other documents relating to that student needs to be made available by the DYEO via Dropbox to the CYEO and other Club Officers and the District YE team who are working towards the exchange, without any need for individual copies.

See R3: Records Folder for Outbound Student - All Programmes.

Download R3A:( Name of Student), Outbound Student Records Folder for each student's records.

#### 2. Record Keeping for Inbound Students

When *The Inbound Student Records Folder* is downloaded and personalised it is ready to accumulate all the documents relating to the Inbound student and when put in Dropbox may be made accessible to the CYEO, the Counsellor and the current Host family as well as to the District YE team.

See R4: Records Folder for Inbound Students - All Programmes. This gives details of the

### 3. Record Keeping relating to the Selection of Adults for Youth Exchange.

Documents relating to the selection of Host families and Counsellors need secure electronic storage by District. People in this category may take part in Youth Exchange for a number of years and so the data needs to be accessible for future reference as well as storage.

See R2A: Counsellor Records Folder – all Programmes. (download here) and R2B: Host Family Records Folder, (download here) which may be downloaded and personalised

## Storing the Folders

The electronic folders are collected by the DYEO and placed in *R1A: District 1WXY Records Folder for Rotary Year .........* which is downloadable and should be personalised.

For the sake of conformity the Rotary year here relates to that in which the exchange take place. RIBI provides the Youth Exchange Multidistrict with storage facilities for all Exchange records. One of the Multidistrict Registrar's tasks is to liaise with DYEOs in order to transfer the data effectively.