5 DOCUMENT RETENTION
Considerations For Data Governance

Compliance & Risk

Ensure retention policies align with applicable laws such as:

- HIPAA (health data)
- GDPR/CCPA (donor and constituent privacy)
- COPPA (minors' data)

Why it matters: *Over-retention increases breach risk and liability. Under-retention can lead to noncompliance and legal penalties.*

Retention and Purging Workflows

Implement rules-based automation to:

- Enforce retention timelines
- Purge expired documents
- Minimize manual errors

Why it matters: *Automation ensures consistency, especially in high-turnover environments, and reduces reliance on staff memory or training.*

Storage and Access Controls

Ensure retention policies align with applicable laws such as:

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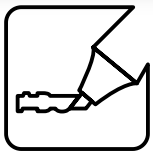
- GDPR/CCPA (donor and constituent privacy)
- COPPA (minors' data)

Why it matters: *Over-retention increases breach risk and liability. Under-retention can lead to noncompliance and legal penalties.*

Redaction and Annotation



Automate processes to:

- Redact PII before sharing
- Annotate without altering originals
- Comply with data minimization principles

Why it matters: *Redaction protects privacy during internal reviews and external disclosures, reducing accidental exposure.*

Data Governance

Ensure your governance rules are enforced:

- Leverage AI powered search to identify sensitive data at point of acquisition OR in existing documents.
- Apply your rules to tag, append, redact, secure

Why it matters: *Reduce risk and human error by leveraging latest technology to identify and address data concerns effectively and efficiently.*

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