

Policy Statement

The organization is committed to maintaining secure, accurate, and confidential records for all participants in leadership development learning events.

Learner records shall be:

1. Collected only for legitimate educational and administrative purposes
2. Entered and maintained with accuracy and integrity
3. Protected from unauthorized access, disclosure, or alteration
4. Retained in accordance with IACET record retention requirements
5. Released only with proper authorization
6. Issued only upon verified completion of program requirements

All learner records must be entered accurately by authorized personnel, stored securely for a minimum of 7 years, and released only with written authorization or as required by law.

Information Input

- Collect only information necessary for event registration, learning delivery, and certification
- Obtain explicit consent before collecting personal information.
- Learner information shall be entered by authorized team members.
- Completion status and CEU eligibility shall be supported by documented attendance and assessment records.
- Any modification to learner records must be traceable and documented.

Maintenance and Records Retention

- Limit access to authorized personnel only (instructors, administrators, support staff)
- Records documenting CEU awards and completion shall be retained for a minimum of seven (7) years.
- At the end of the retention period, records shall be securely destroyed.
- Subjected to routine data backup procedures

Verification and Issuance of CEU's

- CEUs for leadership development programs shall only be awarded after verification that the participant has:
 - Met attendance requirements
 - Completed required leadership assessments and requirements identified in the design documents
 - Satisfied program participations standards.

- CEU Calculations shall be calculated in accordance with IACET standards.
 - 1 CEU is awarded every 10 contact hours.
- Certificate or transcripts shall include:
 - Learner Name
 - Title of Learning Event
 - Date of Completion
 - Number of CEUs awarded
 - Name of the accredited provider

Release and Issuance

- Release learner records only with written consent from the learner, except where required by law
- Verify identity before releasing records or certificates
- Provide learners' access to their own records upon request

Learner Rights

- Learners may request to review, correct, or delete their personal information
- Learners may opt out of non-essential communications at any time

Roles and Responsibilities

- Executive Leadership
 - Ensures organizational compliance with IACET standards
 - Provides oversight of recordkeeping integrity
- Facilitation Coordinator
 - Verifies completion and CEU Eligibility
 - Approves issuance of certificate
- Facilitators
 - Submits accurate attendance and assessments
 - Maintains confidentiality of learners' information
- Operations Coordinator
 - Maintains the learner records and issues CEU's

Policy Review and Compliance

- This policy should be reviewed annually to ensure continued alignment with
 - IACET Continuing Educations and Training Standards
 - Applicable privacy and data protections laws
 - Organizational operational requirements

All staff handling learner records must complete privacy and security training and follow this policy. Violations will be addressed through corrective action.