



Data Retention Policy

Policy Name	Data Retention Policy
Date Last Update	April 2024
Owner	D. Chapman
Reviewer	Chair of Trustees
Signed and Authorised by	Chair of Trustees and Trustees
Linked Policies	Data Protection Policy Retention of DBS Privacy Statements

Overview

This policy has two purposes:

- It assists the charity with its responsibilities and compliance under Data Protection.
- It reduces the amount of data held and managed.

This policy sets out:

- how long we will keep your personal information.
 - This applies to all personal data - that is information that could identify you as an individual.
 - It does not apply to anonymised information we keep for statistical/analytical purposes.

This document covers electronically stored data (such as email, cloud based systems and those held on a computer) and paper based storage system (filing cabinet folders).

Once the retention period has ended the data should be permanently deleted including from electronic recycling bins or destroyed by shredding.



General

Type of Information	Stored	Deleted
Text messages	Individual's devices.	6 months if not sooner unless relating to an accident or safeguarding incident in which case they will be transferred to the relevant electronic document.
Photographs	Password Protected Drive.	If you have given permission for these to be used for publicity they will be kept indefinitely unless you request that they be deleted at which point we will take every reasonable step to delete them.
Official meetings	This policy does not apply to official meetings eg trustee meetings.	

Volunteers

Type of Information	Stored	Deleted
Paper Volunteer Application Form	In the filing cabinet and transferred to electronic volunteer record on Password Protected Google Drive and Password Protected Database.	6 months after transfer to Database.



Volunteer Application Form	Electronic volunteer record on Password Protected Google Drive and Password Protected Database.	2 years after role ends unless there is a formal complaint (see below).
Serious Incidents	Password Protected on Database.	10 years after end of the incident. May be kept longer at the discretion of the trustees if any legal liability.
Health and Safety Records	Details of any health and safety incidents / records relating to your volunteering on database and in accident record stored securely password protected on Password Protected Database.	3/4 years in accident file unless classed as a serious incident (see above).
Contact details stored in other places eg MailChimp.	Stored securely on Password Protected electronic system.	Removed as soon as volunteer resigns unless opted in to remain on Mailing List.
Volunteer Record	Password Protected Database.	6 years after resignation.

Service Users

Type of Information	Stored	Deleted
Self referral or Third party referral who cannot be contacted and/or indicate they do not want us to follow up.	Information stored on Password Protected Database.	12 months after last contact.
Paper Referral Form	In the filing cabinet and transferred to Password Protected Database.	6 months after transfer to Database.



Electronic Referral Form	Password Protected Database.	2 years after contact has ended.
Individual Service User Record - paper	In the filing cabinet and transferred to electronic volunteer record on Password Protected Database.	6 months after transfer to Database.
Individual Service User Record - electronic	Password Protected Database. All information should be updated within 24 working hours of receiving an update and the obsolete information deleted e.g. when a new e mail address is provided Or a new emergency contact.	6 years after last contact. Though non relevant information should be deleted immediately e.g. emergency contact information.
Event Attendance lists - paper	Transferred to Password Protected Database.	6 months after transfer to Database.
Event Attendance lists - electronic	Password Protected Database.	Once event has taken place and follow up information sent.
Financial information from donors	All financial information should be stored in the financial database including gift aid.	6 years after the last donation received.