

# Redwick Village Document Retention Policy

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## Introduction & Scope

As a small village hall Redwick Village Hall's ("the Charity/s") the scope the Document Retention policy is and covers the below types of documentation:

- The Charity's Governing Document
- Booking documentation.
- Accounts data, including Gift Aid paperwork.
- Utility and Local Authority bills and communications.
- Meeting minutes.
- Insurance documentation.
- Sales of Alcohol and other licences.
- Other documentation required to manage the day to day running of the Charity.

For the purpose of this policy emails are excluded from this policy, however any attachments sent or received via email are within its scope.

## Documentation Formats & Storage

Documentation can be in the form of physical media i.e. on paper or in an electronic format.

Electronic documentation may be stored in the Cloud, on a Trustee or Management Committee members laptop or other form of electronic storage. To comply with the Charity's Data Protection Policy a 'Cloud' first approach is preferred, with information stored in the Charity's OneDrive storage solution. The Governing Document shall be stored in the Cloud as well as being visible on the Charity's website ([www.redwickhall.org.uk](http://www.redwickhall.org.uk))

Physical documentation will be retained by either the Secretary, in the case of written communications to the Charity or the Treasurer in the case of accounting information. Where practical all physical documentation should be scanned and moved to the Charity's OneDrive solution.

## Documentation Retention Principles

To comply with the Charity's Data Protection Policy no document whether physical or electronic should be stored any longer than required.

The following retention periods shall apply to documentation received by or created by the Charity:

Document Type	Retention Period
Governing Document	Never deleted or destroyed. Any updates to the document will result in a previous version being deemed as archived.
Booking Documentation	This can be in both a physical and electronic format and shall be retained for a period of 18 months from the date at which it is supplied by a hirer to the Charity.
Accounts data, including Gift Aid paperwork	7 years from the date on which the accounts are submitted to the Charity Commission.
Utility and Local Authority bills and communications	3 years from receipt.
Meeting minutes	Never deleted or destroyed.
Insurance documentation	3 years from receipt
Sales of Alcohol	Never deleted or destroyed. Any updates to the document will result in a previous version being deemed as archived.
Other licences, such as PRS	On expiry
Other documentation required to manage the day to day running of the Charity e.g. Management Committee Terms of Reference, policies and procedures.	Never deleted or destroyed. Any updates to the document will result in a previous version being deemed as archived.

## Other Policies

The Charity's Data Protection Policy should be read in association with this policy.

## Version Control - Approval and Review

Version No	Approved By	Approval Date	Main Changes	Review Period
1.0	Board of Trustees	20 <sup>th</sup> August 2023	Initial draft approved	Annually