

# CHARNEY HALL AND FIELD TRUST

(Charity No 294765)

## Document Retention Policy

Documents to retained as detailed in following table

All physical documentation to be examined annually and anything no longer required to be shredded or disposed of appropriately. Such documentation is held in a box in the storeroom of the hall.

October 2020

		CB web site	Google Drive	Secretary		Treasurer		Chair/Vice Chair		Storero om	Trustees		Hall Lead Trustee		Field Lead Trustee	
				Physical	Digital	Physical	Digital	Physical	Digital		Physical	Digital	Physical	Digital	Physical	Digital
Minutes		3 years	All years forever	all years in minute books forever	Forever											
Agenda			Current	all in minute books forever	Forever											
Governing document		Forever	Forever	Forever	Forever		Forever		Forever			Forever				
Charity Commission documentation			Forever	Forever	Forever		Forever		Forever							
HMRC correspondence & claims			7 years			3 years	7 years			7 years						
Financial records	Annual Accounts		7 years			3 years	7 years			7 years						
	Bank statements		7 years			3 years	7 years			7 years						
	Cheque books		7 years			3 years	7 years			7 years						
	paying in books		7 years			3 years	7 years			7 years						
	Purchase records		7 years			3 years	7 years			7 years						
	Income		7 years			3 years	7 years			7 years						
	Correspondence		7 years			3 years	7 years			7 years						
	Insurance policy documents		3 years			3 years	3 years			3 years						
	Licencing		3 years			3 years	3 years			3 years						
Play Equipment Guarantee			Forever												Forever	Forever
Weekly play equipment inspection sheets															?	?
Play equipment inspection reports			5 years												5 years	
Fire Alarm & Fire Extinguisher certificates			3 years	3 years												
Hall Health & Safety Assessments			5 years													
Field Health & Safety Assessments			5 years													
Fire Health & Safety Assessments			5 years											5 years		
Policy Documents		Forever	Forever		Forever		Forever									
PAT testing records			3 years							3 years						
Electrics testing records			5 years							5 years						
Major purchases invoices			Forever			Forever				Forever						
Accident/incident report records	hall or field		3 years										3 years		3 years	
Accident/incident report records involving a child	hall or field		3 years after 18th birthday													
Legal correspondence			Forever	Forever												
Major Projects			Forever	Forever												
MOU with PC			Forever	Forever												
Personal Data	email addresses											tenure as trustee				
	Phone numbers											tenure as trustee				
	Trustee personal information											tenure as trustee				

24/10/2020