DATA RETENTION PERIODS

## This note defines the data retention periods to be followed by Roding Valley u3a.

For data not covered within this note, please contact the GDPR coordinator at [RVu3a@hotmail.com](mailto:RVu3a@hotmail.com)

| Type | Detail | Responsibility |
| --- | --- | --- |
| Financial documents | All financial documents must be retained for at least **six years.** | Treasurer |
| Governance Records | AGM reports, annual accounts and minutes should be retained for the **life of the u3a**. All signed committee meeting minutes should be permanently retained where possible. | Secretary |
| Gift Aid Declarations | Gift Aid declarations are part of our Gift Aid records and should be kept for **six years** after the end of the year or accounting period that includes the last donation to which they relate, or at least 12 months after our claim for the last donation to which the declaration relates if this is later. | Treasurer |
| Members personal data | Subject to the requirement of retaining records relating to Gift Aid, where a member has not renewed their membership for a period more than **13 months,** their personal data held in both electronic and paper format, should be deleted / destroyed. | Membership Secretary  Groups Coordinators  Interest Groups and Social Events Convenors |
| Incident Forms | Incident forms should be retained for three years. This period can be extended if there is an ongoing insurance claim. | Chair |
| GDPR request | All requests relating to data privacy should be retained while the requestor is a member of the Roding Valley u3a and for 13 months thereafter. | GDPR Coordinator |

## Note:

Electronic format, properly backed up, is satisfactory.

It is important that records are properly kept and handed on to subsequent committees. The minutes can provide a useful reference point for future committees and where disputes or concerns arise over actions taken and decisions made.

# Adoption and Review

This policy was adopted on ………………

Policy review date…………………………….

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| --- | --- | --- |
| Version | Description of changes | Date |
| 0.1 | Draft prepared by Laura Blake | 24 04 2023 |
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