



Woodlarks Camp Site Trust

Document Retention Policy

2017

1	Introduction.....	3
2	Information Sources	3
3	List of Documents.....	3
	3.1 Notes	4
4	Special Documents.....	5
5	Destruction	5
6	Document Review	5

1 Introduction

Woodlarks accumulates a great deal of paper. We need a policy to determine what is kept, where it is kept and for how long. The policy is intended to show that we manage our records professionally

2 Information Sources

The policy is based on discussions amongst the Trustees and Sarah Lane our Secretary. We have also sought advice online, notably from [http://www.buzzacott.co.uk/insights/retention-of-accounting-records-\(1\)](http://www.buzzacott.co.uk/insights/retention-of-accounting-records-(1)) .

It is intended to cover all documents stored by the trust indicating where they are stored and for how long they will be retained.

3 List of Documents

Document Type	Storage Location	Retention Period	See Note (below)
Invoice, delivery note etc.	KMH/Undercroft	6 years	1
Bank Documents	KMH/Undercroft	6 years	1
Payroll documentation	KMH/Undercroft	6 years plus current year	1
Legacies	KMH/Undercroft	6 years after the estate was wound up	1
Accident Books	KMH/Undercroft	3 years after last investigation or last entry	1
Expense accounts	KMH/Undercroft	6 years plus the current year	1
Lists of Camp attendees	KMH/Undercroft	Indefinitely	2
Engineering Records	Online	3 years	3
Policies	Online	Current policies only	4

Employers Liability Insurance Certificate	KMH/Undercroft	Forty Years	6
Insurance Policies	KMH/Undercroft	Three years after lapse	
Refuse Disposal Records	KMH/Undercroft	2 years	1
Fire Drills and alarm test records	KMH/Undercroft	2 years	1
Camp Leaders' Acceptance letters	KMH/Undercroft	Indefinitely	5
Refrigerator Temperature Records	KMH/Undercroft	One year	1
Utility Bills	KMH/Undercroft	6 years	1
Insurance Inspection Records	KMH/Undercroft	6 years	7
Building Documents	Undercroft	Indefinite	8

3.1 Notes

1. Current documents are stored in KMH until moved to longer term storage in the Undercroft.
2. We have had Police enquiries going back more than 10 years
3. Online location available to Woodlarks personnel only. Includes water temperature logs, emergency lighting tests and PAT test results.
4. Freely available in PDF form at <http://www.woodlarks.org.uk/woodlarks-policies/> . Signed copies of the document are kept by Alexine Crawford.
5. These letters indicate Camp Leader acceptance of responsibility and agreement to conform to our policies.
6. Employers Liability (Compulsory Insurance) Regulations 1998.
7. These include certification of the aerial runway equipment and the lifting equipment (hoists etc.) covered by the Loler

Regulations. Also included are boiler and electrical safety certificates.

8. These documents refer to the construction of Bradbury Croft and the new pool changing rooms.

4 Special Documents

Several documents are retained by Alexine Crawford for safe keeping

These include

- Rivington Street Holdings Share certificate
- Copy of 1931 Trust Deed
- Wardens' Agreement/contract Jan 2003
- Camp Warden's Tenancy Agreement 1998
- Tree Preservation Revocation order 2003
- Scheme 2003
- Guarantee Bond
- Warden and Secretary's contracts and tenancy agreements dated 2016.

Alexine also has documentation related to the building of Bradbury Croft and a file with Land Registry documents.

A document registering Woodlarks with The Official Custodian for Charities' Land Holdings is lodged with Bells Solicitors, 11 South Street, Farnham, Surrey, GU9 7QX.

5 Destruction

All outdated paper records are to be destroyed by shredding or burning.

Online records will be deleted. Deletion will be assumed sufficient, digital shredding etc. will not be required.

6 Document Review

This policy will be reviewed every three years.

Signed:

Date:

Print name: Alexine Crawford
Chairman

Position held:

Implemented: June 2017

Next review: June 2020

Person responsible: Mark Greenwood