



# **Woodlarks Camp Site Trust**

## **Document Retention Policy**

**2020**

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# 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

<b>Document Type</b>	<b>Storage Location</b>	<b>Retention Period</b>	<b>See Note</b>
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	
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
Trustee Minutes	Kept by chairman	Indefinitely	
Management Committee Meeting Minutes	Undercroft		

### 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 Sarah Lane. Policies such as The Camp Leaders' Handbook are not kept online for reasons of data protection. Sarah Lane will provide these as required.
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 at her home (High Wray, 73 Lodge Hill Road, Farnham, Surrey, GU10 3RB) 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.

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.

The periods shown are minimum retention periods. It is not always practical to look through hundreds of documents every year to find documents that are candidates for deletion.

## 6 Document Review

This policy will be reviewed every three years.

Signed:

Date:

Print name: Grahame Done

Position held: Chairman

Implemented: March 2020

Next review: March 2023

Person responsible: Mark Greenwood