



Woodlarks Camp Site Trust

Document Retention Policy

2023

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1 Introduction

Woodlarks stores a substantial amount of data. Historically this was kept on paper. Where practical we are moving from paper documents to online storage. There is no fixed timescale for this transition and we will not retrospectively scan paper documents.

Previous versions of this document included the management of financial documents, these are now covered by our Financial Policy.

We need to keep some items, such as insurance certificates, for legal reasons, but we don't want to keep anything that might compromise our security or violate the requirements of GDPR.

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	Medium (as of 2023)	Retention Period	See Note
Accident Books	Paper	3 years after last investigation or last entry	1
Lists of Camp attendees	Paper	Indefinitely	2
Engineering Records	Online	3 years	3
Policies	Online	Current policies only	4
Employers Liability Insurance Certificate	Paper	Forty Years	6
Insurance Policies	Paper	Three years after lapse	
Refuse Disposal Records	Paper	2 years	
Fire Drills and alarm test records	Paper	2 years	1
Camp Leaders' Acceptance letters	Paper	Indefinitely	5
Refrigerator Temperature Records	KMH/Undercroft	One year	1
Building Plans	Undercroft	Indefinite	

Insurance Inspection Records	Paper	6 years	7
Building Documents	Paper/DVD	Indefinite	8
Trustee Minutes and Rules	Kept by chairman	Indefinitely	
Management Committee Meeting Minutes	Paper		
Plant and Machinery records	Paper	Until one year after removal	

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.
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 Catherine Crawford at her home (High Wray, 73 Lodge Hill Road, Farnham, Surrey, GU10 3RB) for safe keeping

These include

- Copy of Woodlarks Camp Site Trust deed 1931
- The scheme, dated 4 March 2003
- Sarah and Nick's signed contracts 2016
- Signed Service occupancy agreement 2016
- Signed letter supplementary to the contracts and service occupancy agreement 2016
- Statement of particulars of employment (Sarah & Nick)
- Notice of deletion of 2005 rating list entry for the camp site & accompanying letter, both dated 2010.
- Tree preservation order revocation June 2003

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:

Catherine Crawford Position held: Chairman

Implemented:

April 2023

Next review:

April 2026

Person responsible:

Malcolm Jarrett