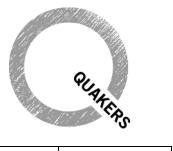


	Example Retention Schedule – 'Smithfield' Area Meeting – this is a good exercise for Area Meetings to complete – this is only the start of a draft which should be tailored to the specific needs of the meeting – it is a good exercise for the meeting to do to reassess recordkeeping and digital issues.							
Record Title	Description	Regulatory retention period and source	Recommended retention period	Access Conditions	Form be kept	Share/store via Cloud?	Reasons and remarks	
Minutes	All finalized, preferably signed minutes for Area and Local meetings.	Charity Commission guidance BYM business decision Life of company (Companies Act, 1985)	Permanent	50 year closure period	Paper	Yes, but not only copy	Minutes should preferably be printed onto acid-free paper. Cyclical transfer to place of deposit (after approx.10 years).	
Supporting papers			Permanent	50 year closure period	Paper	Yes, but not only copy		
Elders & Overseers Minutes		BYM business decision; safeguarding	Permanent	Closed for 100 years from creation (DPA	Paper	No	Closed for 100 years as may contain	



			1998)			sensitive personal information about children and adults.
Sufferings		Permanent	Closed for 100 years from creation (DPA 1998)	Paper	Νο	Closed for 100 years as may contain sensitive personal information.
Membership registers		Permanent	50 year closure period	Paper	No	
Finance Committee minutes		Permanent	50 years (unless indexed personal information about donors that should be closed for longer under DPA (1998)).	Paper	Depends if confidential in nature	



Membership documents: Reports of visits, applications for membership, details of terminations of membership, certificates of removal		Permanent	Closed for 100 years from creation (DPA 1998)	Paper	Νο	Closed for 100 years as may contain sensitive personal information about children and adults.
Financial records	Limitation Act (1980)	7 years		Paper/electronic	Depends if confidential in nature	
Premises records – approved planning permission		Until disposal of property		Paper		Public record
Draft minutes		Year of meeting +1 year			Yes, but not only copy	
General correspondence	National Archives	5 years		Paper/electronic	Yes, but not only copy	



guidelines guidelines					
Meetings will have to continue the above schedule depending on their specific requirements, for example some meetings may be involved with recruitment of paid employees and therefore need to be aware of their obligations under the Equalities Act (2010).					
For guidance see http://www.nationalarchives.gov.uk/documents/information-management/sched_info_management.pdf					
Also be aware that legislation affecting recordkeeping such as Data Protection law, Freedom of Information law, recruitment law, building regulations etc are subject to change, and that we are impacted by UK <i>and</i> EU legislation and regulations, therefore schedules and access to records will need to be reviewed every few years.					
If you want advice on any issues around retention of meeting records, contact the Archivist or Deputy Archivist at Library of Society of Friends on library@quaker.org.uk or on 020 7663 1135.					