



<b>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.</b>							
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	<b>No</b>	Closed for 100 years as may contain

Template Retention Schedule for Meetings



				1998)			sensitive personal information about children and adults.
Sufferings			Permanent	Closed for 100 years from creation (DPA 1998)	Paper	<b>No</b>	Closed for 100 years as may contain sensitive personal information.
Membership registers			Permanent	50 year closure period	Paper	<b>No</b>	
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	

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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	<b>No</b>	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					
		<p>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).</p> <p>For guidance see <a href="http://www.nationalarchives.gov.uk/documents/information-management/sched_info_management.pdf">http://www.nationalarchives.gov.uk/documents/information-management/sched_info_management.pdf</a></p> <p>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.</p> <p>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 <a href="mailto:library@quaker.org.uk">library@quaker.org.uk</a> or on 020 7663 1135.</p>					