

## Retention Periods

### What is the retention period for Agendas, Approved Minutes and Final Verified Accounts?

In perpetuity

### What about everything else?

- Finance – it is recommended that all financial documents are retained for 7 years, thereafter it is only the verified, final accounts that need to be retained in perpetuity
- Handwritten / draft notes for minutes – good practice to retain these until the minute has been approved
- General paperwork – we should only retain paperwork for the duration of which it is required. Under the Data Protection Principles the section on Storage Limitation states that:
  - *personal data should not be kept in a form which allows individuals to be identified for any longer than is necessary for the purpose for which it was collected. Our systems and processes should be designed to delete personal data as soon as it is no longer needed.*
- Consider what you are holding, is it still required as an audit trail? Is it still relevant to current matters? Is this something that someone might need again in the future or have an interest in?

### What if something might be of historic interest?

When clearing out files, if there is anything that may be of historic interest, it's always worth contacting your local Historical Society who may wish to take ownership of it for future reference by the community.