



Data Retention Policy

The Polehampton Charity (the Charity) will not retain any data longer than necessary. The data that the Charity does retain is either of historical interest and value, or information that the Charity is required to retain as a grant-giving charity.

This policy sets out the Charity's intention to retain data no longer than necessary and the information it does retain, and for how long.

Retaining data

The fifth data protection principle requires that the Charity should not keep personal data for longer than is needed to for the purpose it was collected for. This means that the personal data that is held should be destroyed or erased from the Charity's systems when it is no longer needed. If you think that the Charity is holding out-of-date or inaccurate personal data, speak to the data protection officer (DPO).

Purpose of the Retention Schedule

The retention schedule below is a tool used to ensure the retention of all personal data processed by the Charity, is retained for as long as it is needed. It takes account of the context within which the Charity operates. It is intended primarily as a resource for the Trustees and Clerks who process and retain information and enables disposal activity to be carried out in a consistent and controlled manner.

Doc reference	Last review date	Next review date	Page No:
PHC/DRP/2024	March 2024	March 2025	1 of 2



Data Subject	Data item group	Short-term need (immediate, +1 month)	Medium-term need (+1 year)	Long term (+5 years)	Very long term (+25 years)	Justification
Financial information	Consolidated financial data			Should be kept for 7-20 years		To comply with tax and statutory accounting filing services.
Grant applications	People	3 months maximum and retained on website				Whilst an application is being considered and then in case of any issues.
Property information (tenancies), leases etc	Assets			Should be kept for the length of the lease	Should be kept for the length of the lease	As a legal document this must be retained on file.
Trustee and contractor personal information	People				Should be kept for as long as an individual is associated with the Charity	For the length of time the Trustee or contractor is in post and then a minimum of name and contact email should be retained.
Policies	Information			Likely to be long term.		For as long as is relevant. All live and previous versions should be retained on file.

Monitoring and review of this policy

This policy is to be reviewed by the DPO to ensure it is achieving its objectives using the annual monitoring and review cycle.

Doc reference	Last review date	Next review date	Page No:
PHC/DRP/2024	March 2024	March 2025	2 of 2