

Data Retention Policy

[Church name]

Why we have this policy

Data protection law says we mustn't keep personal information for longer than we need it. This policy sets out how long we keep each kind of record, and what we do when that time is up.

Who it applies to

It applies to everyone who keeps records for the church, including staff, volunteers and trustees. It covers paper, computers, phones, email and shared folders.

How long we keep records

Periods in square brackets are our own choice. The others are set by law or by HMRC.

Record	How long we keep it	Why
People and church life		
Contact details and involvement of members and regular attenders	While they're part of church life, then [2 years] after they leave	Our choice
One-off visitors and enquirers	[12 months] after our last contact, unless they become regular	Our choice
Pastoral notes	Reviewed every [year] , and deleted when no longer needed for the person's care	Our choice
Rotas and service attendance	[1 year]	Our choice
Records of emails we've sent	[3 years]	Our choice
Records of consent, such as for emails or photos	While we rely on the consent, then [2 years]	To show we had consent
Requests to see or delete information, and complaints	[2 years] after we close them	Our choice
Our log of data breaches	[6 years]	Our choice
Giving and money		
Gift Aid declarations	While in use, then 6 years after the end of the accounting period of the last gift claimed	HMRC
Gift Aid claims, and records of the gifts claimed	6 years after the end of the accounting period they relate to	HMRC

Record	How long we keep it	Why
Small Donations Scheme collection records	6 years after the end of the tax year	HMRC
Accounts, bank statements, receipts and invoices	At least 6 years after the end of the financial year	Charity law
Safeguarding		
DBS certificates	We don't keep copies. We see the certificate and record the details in the next row	GOV.UK DBS guidance
DBS check records: date, type, certificate number, role and our decision	While the person is in the role, then [as our safeguarding guidance says]	Safeguarding guidance
Safeguarding concerns, allegations and case files	[As our safeguarding guidance says] . Often decades. Never deleted early	Safeguarding guidance
Children's and youth group registers, and parents' consent forms	[As our safeguarding guidance says]	Safeguarding guidance
Staff, buildings and running the church		
Payroll records	3 years after the end of the tax year	HMRC
Records of accidents	At least 3 years after the entry. [Longer if our insurer advises, especially if a child was hurt]	Health and safety law
Minutes of trustee and church meetings	Permanently	Church history
Registers of baptisms, marriages and funerals	Permanently, as our denomination requires	Our denomination
Governing document and property deeds	Permanently	Needed for as long as the church exists

When the time is up

Each [year], [the church administrator] reviews our records and deletes or destroys what we no longer need. Paper is shredded. Computer records are deleted, including copies in email, shared folders and on personal devices.

Sometimes we keep a summary with names removed, such as how many people came to a service.

When we keep records for longer

We keep a record past its time if we need it for an HMRC enquiry, a legal or insurance claim or a safeguarding matter. We delete it once that's resolved.

When someone asks us to delete their information, we delete what we can. We keep only what the law requires, such as Gift Aid records, and tell them why.

Who is responsible

[The trustees] approved this policy on [date]. [the church administrator] makes sure it's followed, and we review the policy every year.