



Birmingham Conservation Trust Retention Policy

This document sets out Birmingham Conservation Trust's policy on the disposal and retention of records. It applies to all records, both in paper and electronic forms.

The Coffin Works' Museum is run and owned by Birmingham Conservation Trust, and all guidelines outlined within this policy are therefore applicable to the museum and its data.

Records and information should only be retained for legitimate business use. Under GDPR (2018), personal data processed by Birmingham Conservation Trust must not be retained for longer than is necessary for its lawful purpose.

Birmingham Conservation Trust will review information regularly to ensure that it is:

- **Necessary** – the information must hold some value for Birmingham Conservation Trust to carry out its functions.
- **Proportionate** – in order to justify the retention of the information, it must be excessive in relation to the purpose it was collected
- **Adequate** – in order to justify the retention of information, it must be as complete as possible
- **Relevant** – information must be fit for the purpose for which it is held
- **Accurate and up to date** – all record details must be accurate, records must be updated with any new information
- **Of Historical value** - it may also be necessary to retain information of particular legal or historical significance.

As a charity, the actual period for records to be kept will depend on a number of factors, including:

- Legal requirements
- Storage availability
- The charity's need to access the document
- Historical value

Records will only be retained beyond the specified retention period if their retention can be justified for statutory, regulatory, legal or security reasons or for their historic value. Where specific details are no longer required, those elements of the data will be anonymised.

| Type of Record | Retention Period |
|---|--|
| Financial records including: records of banking transactions, tax records, audits, invoices, purchase orders. | Six years following the end of the financial year the record relates to. |



| | |
|--|---|
| Staff or volunteer bank accounts details | One month following the final payroll / payment. |
| Staff pension details | 75 years post-employment or one-year post death (whichever is the sooner). |
| Next of kin details | One month following the last working/volunteering day of the staff/volunteer. |
| Staff/volunteer training records | 6 years following the final working/volunteering date expect for drop stamp or first aid training records which may be kept for 12 years in case of insurance claims. |
| Staff/volunteer disability records | 6 years following the final working/volunteering date. |
| Staff/volunteer contact details | 6 years following the final working/volunteering date. |
| Unsuccessful staff/volunteer application details | 6 months following the application closing date (paid roles) or 6 months following the date on which the application was deemed unsuccessful (voluntary roles). |
| Customer details | One month following the end of the customer relationship. |
| Potential customer details | One year following the associated marketing campaign. |
| Photographs | BCT may store and use images for which consent has been given for the lifetime of the trust. If consent is withdrawn, images may be deleted or moved to the BCT archive if deemed historically significant. |



| | |
|-----------------------|--|
| CCTV Footage | Three months following the date of recording unless required to be retained longer for crime detection/insurance claim purposes. |
| Historical Archives | BCT may store and use data within its historical archives for the lifetime of the trust |
| Accident Book entries | 12 years (to allow for historic insurance claims). Following that, data will be anonymised to help track accident figures/trends or destroyed. |

The destruction of records includes electronic and paper copies as well as the related backups. Some electronic backups may be recoverable for up to 12 months post destruction date due to third party software retention policies.

Birmingham Conservation Trust keeps a destruction log which records when and how data has been destroyed.

This policy was last revised on the 6th June 2018.