

**The Religious Society of Friends (Quakers) in Wales and the Marches
Charitable Incorporated Organisation (Cymar)**

Records Retention Schedule for Cymar (Draft)

Record Title	Description	Regulatory retention period and source	Recommended retention period	Access Conditions	Form be kept	Share/store via Cloud?	Reasons and remarks
Minutes: Cymar (including Trustees) CC-QW AM LM	Finalised Minutes, preferably signed, together with relevant supporting papers (as below)	Charity Commission guidance BYM business decision Life of company (Companies Act, 1985)	Permanent	50 year closure period	Paper/Digital	Yes, but not only copy	Minutes may be printed onto acid-free paper, but standard paper is now be acceptable. Cyclical transfer to place of deposit
Supporting papers			Permanent	50 year closure period	Paper/Digital	Yes,	as above
Elders & Pastoral Care Minutes		BYM business decision; safeguarding	Permanent	Closed for 100 years from creation (DPA 1998)	Paper/Digital	Exercise caution, confidential minutes accessible on a need to know basis only	Closed for 100 years as may contain sensitive personal information about children and adults.

**The Religious Society of Friends (Quakers) in Wales and the Marches
Charitable Incorporated Organisation (Cymar)**

Records Retention Schedule for Cymar (Draft)

Record Title	Description	Regulatory retention period and source	Recommended retention period	Access Conditions	Form be kept	Share/store via Cloud?	Reasons and remarks
Safeguarding	Children's Group Records Children and Young Person's Committee Minutes Safeguarding concerns Annual Safeguarding Reports		100 years	All held confidentially e.g. locked filing cabinet with highly restricted access, password protected files on a computer	Paper/Digital	Must be held with password protected security	Annual Safeguarding report sent to BYM Serious incidents reported to Charity Commission, Local Authorities, Insurers
Membership registers			Permanent	50 year closure period	Paper/Digital	Held securely, limited access	
Membership documents: Reports of visits, applications for membership, details of terminations of			Permanent	Closed for 100 years from creation (DPA 1998)	Paper/Digital	Held securely with access only on a need to know basis	Held at AM level Closed for 100 years as may contain sensitive personal information

**The Religious Society of Friends (Quakers) in Wales and the Marches
Charitable Incorporated Organisation (Cymar)**

Records Retention Schedule for Cymar (Draft)

Record Title	Description	Regulatory retention period and source	Recommended retention period	Access Conditions	Form be kept	Share/store via Cloud?	Reasons and remarks
membership, certificates of removal							about children and adults.
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	
Financial Records		Limitation Act (1980) BYM decision	7 years		Paper/electronic	Depends if confidential in nature	
Premises records – approved planning permission			Until disposal of property		Paper		Public record
Special Projects							

**The Religious Society of Friends (Quakers) in Wales and the Marches
Charitable Incorporated Organisation (Cymar)**

Records Retention Schedule for Cymar (Draft)

Record Title	Description	Regulatory retention period and source	Recommended retention period	Access Conditions	Form be kept	Share/store via Cloud?	Reasons and remarks
General correspondence		National Archives	5 years		Paper/electronic	Yes, but not only copy	Not generally archived these days
Other documents	Newsletters Testimonies Visitors books Items of specific historical interest		Newsletters, testimonies – permanent Visitors books – 5 years	50 year closure period Open	Paper	Yes, but not only copy	Visitors books retained at LM level Some important historical records may be selected for retention and deposition at appropriate Archives