

Centrestage Productions

**YOUTH
THEATRE**

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CPYT/003

Retention of Data Policy

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Approved by: Trustees

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1.0 Introduction

1.1 Records management is essential for the efficient conduct of business and adherence to legal obligations. CPYT is committed to establishing and maintaining good records management to ensure that it retains important information while also ensuring that data no longer required is disposed of in line with its obligation under Data Protection legislation. A robust records management process also ensures that CPYT can fulfil disclosure requirements to data subjects and also under the Freedom of Information Act (2000)

2.0 Records

2.1 Records can be defined as 'information created, received and maintained as evidence and information by an organisation or person in pursuance of legal obligations or in the transaction of business.

2.2 Records are an essential resource and contain information which is unique and invaluable. They can be used as an audit trail as they provide evidence/proof of a specific activity. Records come in electronic (including emails, video and audio materials) and paper format. It is important that both types must be managed equally well, especially in terms of storage, accessibility and disposal.

2.3 Records should be managed in accordance with the principles below:

Records: Records are evidence of our actions and decisions and must be retained as long as required.

Responsibility: All trustees and volunteers have responsibility for records and should be aware of what they are using and creating and how they should be retained.

Risk: There are significant risks from loss, damage or unauthorised access which need to be managed effectively. There are also risks from loss of control of records.

Retention: Keep records only as long as they are needed.

Rights: The public has a right to access our records subject to data protection regulations and freedom of information exemptions.

Reliability: Records should be managed effectively to ensure they are high quality and reliable.

3.0 Retention Schedule

3.1 The purpose of retention schedules are to:

- Improve efficiency of working practices and enable easy and speedy retrieval of records;
- Prevent records from being discarded prematurely;
- Ensure that information is not kept unnecessarily;
- Eliminate retention of duplication of records;
- Provide a consistent, controlled system for the disposal of material across CPYT.
- Help in saving space, time, effort and money;
- Comply more readily with requests for information, both internally and externally (e.g. request made under data protection legislation or the Freedom of Information Act 2002).

3.2 A properly implemented and consistently applied records retention schedule improves the efficiency of working practices and protects the interest of CPYT by ensuring that records are not kept for longer than they are needed to meet operational needs.

3.3 CPYT does not keep all records permanently. Only records which have evidential, legal, historical or business importance are retained for a specific length of time or permanently (in limited cases). The time periods for retention are outlined in the retention schedule.

3.4 Multiple copies of records should not be retained. Extraneous copies of paper documents are to be disposed of. Where these include personal data or confidential information, these should be disposed of securely in a confidential waste bin or shredded. Only one copy of the document is therefore retained for retention purposes. This also applies to emails. Key emails should be retained and care is taken to establish which should be maintained and which deleted.

4.0 Staff and Volunteer Responsibilities

- 4.1 The trustees and Management Committee have overall responsibility for the management of records generated by the activities of CPYT>
- 4.2 The DPO has particular responsibility to ensure the integrity of all records. Trustees are responsible for managing alumni records as well as applicant data.
- 4.3 Any staff or volunteer that creates, receives and uses documents have record management responsibilities. Each person is responsible for ensuring that records within their control are not kept permanently, unless they fall within the various categories listed in the retention schedule and need to be retained for archival purposes.
- 4.4 All staff and volunteers should be aware that they are creating records through their activities and ensure that these are secured and disposed of appropriately, including emails. They should establish which emails are key records and act accordingly.

5.0 Record Retention

- 5.1 The law in the UK requires Accident records to be kept for a minimum of 3 years (unless they fall under COSHH regulations). However, beyond this period, these records are to be destroyed.
- 5.2 Finance and legal document will be kept in accordance with National legal requirements and guidance published by relevant organisations such as:
- The Charity Commission
 - NODA

Signed:



Chair