

## Data Retention Mix and Match Answer Sheet

Data type (What?)	Duration (How long to keep?)	More information
Starter forms	<p>Pages 1-2: Give to parents/carers.</p> <p>Pages 3-4: Personal data should be uploaded to GO as soon as possible and then these pages destroyed securely.</p> <p>Page 5: Is to be retained at unit level for duration of their membership (Pages 5-6 for Rangers).</p> <p>Page 7: If completed, should be retained from the year of the last donation, plus six financial years.</p>	<p>Three sections to form: data collection, photo consent and gift aid form.</p> <p>(Note: financial years run from 1 April to 31 March.)</p>
Unit financial accounting pack	The year of transaction, plus six financial years.	<p>Excel spreadsheet, bank account records, receipts and outgoing expenses.</p> <p>Statutory obligation to keep accounting records under the Companies Act 2006 and Charities Act 2011.</p> <p>(Note: financial years run from 1 April to 31 March.)</p>
Evidence of unit management	The year the record was created, plus six years.	<p>Records of complaints and records of compliance.</p> <p>Best practice to retain evidence of operational practice and decisions.</p>

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Trustee minutes	Life of charity.	<p>Official records of decisions or declarations taken.</p> <p>Requirement of the legislation that regulates companies and charities.</p>
Local meeting minutes	The year the records were created, plus six years.	<p>These are records of operational decisions taken for day-to-day management of a unit.</p> <p>To be retained for evidence of good management, matched to the financial retention requirements for consistency.</p> <p>(Note: these records do not qualify as statutory minutes.)</p>
Health forms and consent forms for an event or activity	<p>Retain for the duration of the event.</p> <p>(If there is an incident, copy all forms for the injured party and send originals for the injured party to Girlguiding HQ.)</p>	<p>These documents only need to be kept until the purpose for which the data was collected has been fulfilled; this is the duration of the planned event and the forms can be destroyed afterwards.</p> <p>If an incident occurs, the health form, permission form, incident notification and risk assessment involving the injured party should be copied, and the originals sent to Girlguiding HQ. When HQ confirms receipt, copies can be destroyed.</p>
Registers	Retain for the membership year the record was created.	<p>Membership is renewed annually. These records do not need to be retained for longer than the current membership period.</p> <p>(If you are using the recording tool on GO, you do not need to keep paper copies as well. If the unit register also includes payment of weekly subs, this is a financial record and should be kept for the year of transaction, plus six financial years.)</p>

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A unit risk assessment	Six years of continuous records.	<p>The original and dynamic versions. Site, activity and fire risk assessments.</p> <p>Records of risk assessments written for active situations (for example, ongoing unit meetings) need to evidence the environment is safe for the girls and need to be retained for legal purposes.</p> <p>Note: a risk assessment for a one-off event only needs to be kept for the duration of the event, or if there was an accident or incident.</p>
Notification of a safeguarding concern form	To be sent to Girlguiding HQ Safeguarding team. Once receipt confirmed, destroy securely. There is no need to retain locally.	<p>To record concerns and behaviours of girls or leaders.</p> <p>The reporting of a safeguarding concern is required to protect children and is a statutory requirement.</p>

**Printing and preparation notes:**

Print double sided, 1x per trainer.