



## **The Fuel Poverty Research Network's Data Retention Policy**

This policy is a tool to ensure all personal data held by the Fuel Poverty Research Network is retained for as long as it is needed. The actual period that personal data is kept will depend on a number of factors including:

- Legal requirements, for example compliance with charity law, General Data Protection Regulation and the Data Protection Act 2018;
- HMRC guidance;
- Charity good practice as recommended by the Charity Commission;
- The charity's own need to access the document;
- Historical value.

This policy is intended primarily as a resource for those responsible for processing data and to enable the disposal activity to be carried out in a consistent and controlled manner.

The Fuel Poverty Research Network collects, processes and stores various different categories of data. Each category has its own retention period which applies to all records in that category and to all formats: paper and electronic. The data retention period will be adhered to wherever possible, although it is recognised that there may be exceptional circumstances which require documents to be kept for either shorter or longer periods. If individual records or documents require an alternative retention period, the reasons for this should be noted and retained with the data.

Information of historical value to the Trust includes data relating to grant themes, significant events, reports, committee membership and Chairship. This information might include personal data. Such information will be archived and kept permanently.

The schedule below outlines the retention periods for each different category of personal data and the appropriate disposal activity.

<b>Category of Data</b>	<b>Data Details</b>	<b>Retention Period</b>	<b>Disposal Activity</b>
Emails	Email address, names, postal address, telephone numbers	Preserved until closure of charity.	Paper: n/a Electronic: delete
Files on projects awarded grants	Name, organisation, email addresses, postal addresses, telephone numbers, bank details, CVs	7 years after last grant payment made.	Paper: shred Electronic: delete
Files on unsuccessful grant applicants	Name, organisation, email addresses, postal addresses, telephone numbers, CVs	Up to 3 months after Trust meeting at which application was rejected.	Paper: shred Electronic: delete
Grant database	Name, organisation	Preserved until closure of charity.	Paper: n/a Electronic: delete
Project reports	Name of author, organisation and sometimes postal and email address	Preserved permanently in archives.	n/a
Contractors	Names, email addresses, postal addresses, telephone numbers, bank details, CVs	6 years after expiry or termination of the contract.	Paper: shred Electronic: delete
Unsuccessful tender documents	Names, email addresses, postal addresses, telephone numbers, CVs	Up to 1 year after date of last document submitted.	Paper: shred Electronic: delete
Jiscmail subscribers	Name, organisation, email address	Indefinitely until closure of charity, or as long as newsletters are issued or until the person unsubscribes.	Paper: n/a Electronic: delete
Trustee appointment data	Names, email addresses, postal addresses, telephone numbers, date of birth, nationality	Full details retained for 6 years from creation.  Names only preserved in archives.	Paper: shred Electronic: delete

Approved by the Trustees: 27th October 2020

To be reviewed: October 2021