

DATA RETENTION SCHEDULE

For BROMSGROVE MINIBUS APPEAL FUND – CHARITY No 516666

Approved by Trustees on: 01/07/2026 ISSUE 1

Next Review: 01/07/2027

This schedule sets out how long the charity keeps different categories of personal data and the lawful reasons for doing so. All retention periods are based on UK GDPR, charity law, insurance requirements, and HMRC rules.

1. Group Contacts Data

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Booking records (name, contact details, journey history)	12–24 months	Service administration; legitimate interests	Secure digital deletion or shredding
Emergency contact details	12 months after last journey	Safety	Secure deletion
Complaints relating to service	3 years	Legal defence; quality assurance	Secure deletion
Incident/accident involvement	3–6 years	Insurance and legal requirements	Secure deletion

2. Volunteer Driver Data

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Volunteer drivers contact details (File of Understanding)	Duration of service + 6 years	Legal defence; safeguarding	Secure deletion
Driving licence checks (File of Understanding)	Duration of service + 6 years	Safety; legal defence	Secure deletion
Training records (including GDPR)	Duration of service + 6 years	Legal defence; compliance	Secure deletion
Volunteer agreements (File of Understanding)	Duration of service + 6 years	Contractual/legal	Secure deletion
Incident/accident involvement	3–6 years	Insurance/legal	Secure deletion

3. Operational & Safety Data

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Incident/accident reports	3–6 years	Insurance/legal	Secure deletion

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Vehicle logs	12–24 months	Operational need	Secure deletion

4. Financial & Administrative Data

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Invoices, receipts, accounts	6 years	HMRC requirement	Secure deletion
Gift Aid declarations	6 years after last donation	HMRC requirement	Secure deletion
Insurance policies	Permanent copy + 6 years for claims	Legal defence	Secure deletion

5. Governance & Compliance Records

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Trustee meeting minutes	Permanent	Charity governance	Archive securely
Policies (current and superseded)	6 years after replacement	Audit trail	Secure deletion
Data breach logs	6 years	Legal defence; ICO compliance	Secure deletion
ROPA (Record of Processing Activities)	Permanent (updated annually)	GDPR requirement	Secure digital archive

6. Digital Communications

Data Type	Retention Period	Reason / Legal Basis	Disposal Method
Emails containing personal data	Up to 24 months	Operational need	Secure deletion
Text messages/WhatsApp used for bookings	Up to 3 months	Operational need	Delete from devices

7. Disposal Methods

The charity uses the following secure disposal methods:

Paper: cross-cut shredding or confidential waste service

Digital: permanent deletion, secure wipe, or encrypted overwrite

Trustees ensure disposal is logged where appropriate.