



Data Storage and Retention Policy

The aim of retaining and storing data is to enable Enkalon Foundation to run efficiently and have accurate records regarding historical funding. This information is used to assist with making funding decisions and monitoring the ongoing work of Enkalon Foundation through annual audits to ensure that it continues to meet its charitable objectives. All hard copy data is stored in the Enkalon Foundation offices. The store rooms remain locked and are only accessible by the Administrator and Trustees. Digital records are stored via a cloud service which meets all the GDPR regulations. Access to these files are limited to the Administrator and Trustees.

This policy was written to clearly outline how Enkalon Foundation gathers, organises, stores and disposes of data and meets the requirements of the current legislation.

1. Information that needs to be kept by law

Certain pieces of legislation set out types of information that should be kept and how long they should be kept for, for example, the Health and Safety at Work Act.

Where there is a legal requirement to keep information by law, we must do this. There are limits as to how long information needs to be kept for legal purposes.

2. Information that has ongoing business use

This is information that is of use to Enkalon Foundation on a day to day basis, and longer term strategic development.

3. Information that is of archival value

Information which offers a picture of the history of Enkalon Foundation and the work that the organisation does for groups and individuals. For example support offered to ex-employees of British Enkalon relies on the storage of Ex-Employee archives which prove an individual worked for British Enkalon and the length of service. This information is stored in hard copy at the Enkalon Foundation offices and is only accessed by the administrator.

Permanent records include a database of all funding ever awarded, pledged or rejected since Enkalon Foundation began in 1987. This information is used when processing current applications for both individuals and groups and allows for historical analysis of the Foundations work.

Application data and detailed financial records are stored for 7 years in accordance with the 7 year liability period. Documents retained for this period are outlined in the retention schedule.

Disposal of Data

The retention schedule lists the data which is stored by Enkalon Foundation and when it will be disposed of. Disposal of hard copy records is carried out on site by the administrator or via a secure external disposal company. Digital copies are deleted from the cloud storage and recycled bin by the Administrator. Trustees have access to digital quarterly papers which are stored on a cloud server and deleted when necessary.

Data Protection

Enkalon Foundation aims to comply with the Data Protection Act and not store any data which is of unnecessary to the organisation. As an organisation we aim to keep data only as outlined in our retention schedule, ensure that data, electronic or hard copy, is held in a secure location and only accessible by Enkalon Foundation staff and Trustees.

Retention Schedule

| <u>File</u> | <u>Type</u> | <u>Retention Period</u> |
|----------------------------------|------------------------|--------------------------------|
| Partial Applications | Electronic | 1 year |
| CAB Referrals | Electronic | 2 Years |
| Ex Employee OT Referrals | Electronic & Hard Copy | 2 Years |
| Emails | Electronic | 7 Years |
| Full Applications | Electronic & Hard Copy | 7 Years |
| Application Supporting Documents | Electronic & Hard Copy | 7 Years |
| Financial Records | Electronic & Hard Copy | 7 Years |
| Database of all Awards | Electronic | Permanent |
| Minutes | Electronic & Hard Copy | Permanent |
| Annual Report and Audit | Electronic & Hard Copy | Permanent |
| Meeting Paperwork | Electronic & Hard Copy | Permanent |
| Ex-Employee Cards | Hard Copy | Permanent |
| Trust Documents and Deeds | Electronic & Hard Copy | Permanent |