

Social Workers Benevolent Trust

Archive Procedure

During Present Financial Year

To monitor all reports, documents, and publicity; marketing; campaigns material placed in the named file in the Financial Year section. These are:

- Meeting Agenda, Minutes, Action Log, Treasurer Report, Cash Flow Report & Presented Papers.
- Copy of articles published, marketing and campaign material.

At End of Financial Year

The Annual Report and Data Statistics & Analysis to be placed in the named file in the Financial Year Section.

Governance, Policies & Procedures on 30th September of the Financial Year from the website to be placed in the named file in the Financial Year section.

Relevant Marketing & Campaign material from the website to be placed in the named file on the Financial Year section.

All applications two financial years old where no grant was given the applicant's details are to be deleted. Applicants file reference remains on file with initials changed to No Grant Given. In comments document reason why not given only, all other details and documents to be deleted in line with GDPR. A dated record of when no grant given reference to be completed and uploaded in the Archive section on Microsoft 365 Teams and document to be deleted in the next financial year.

All applications three financial years old the applicants file to be destroyed in line with GDPR. A dated record of file reference numbers only deleted to be completed and upload in the Archive section on Microsoft 365 Teams.

In three financial years old section the file Reports, Documents, and Publicity; Marketing; Campaigns Material a copy of the section to be transferred to the Archive section on Microsoft 365 Teams. The final version to be digital deposited to Modern Records Centre, Warwick University (refer to MRC Section in Archives Section for process)

The Treasurer holds the SWBT accounts records to be destroyed after six financial years.