

Officeholders Management of Documents & Records

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Purpose of this Procedure

This document details the controls required by the NFU for the retention and destruction of documents, records and files stored and created by Officeholders.

A document, record or file is defined as a written document that provides evidence of an activity associated with the NFU. This includes information stored within paper and electronic files and includes emails.

Retention and Disposal of Documents and Records

The management of NFU Officeholder documents must take into account GDPR, financial and legal regulations, along with best practice business considerations.

The General Data Protection Regulation (GDPR) imposes certain obligations upon the NFU in relation to the processing of personal data, including not keeping data for longer than is necessary. The Act states that 'Personal data processed for any purpose or purposes shall not be kept for longer than necessary for that or those purposes'. Officeholders must follow GDPR and be able to recognise and respond to Data Breaches.

Officeholders must ensure they are managing their records and that they remain legible, readily identifiable and retrievable for the purposes of disposing of them as defined in the Retention Schedule Table below. The Retention Schedule ensures Officeholders are aware of the types of information they have and how long it should be retained.

It is the responsibility of the Officeholder to ensure all documents and records associated with the NFU are destroyed when the Officeholder leaves their post.

Retention Schedule			
Record Description	Retention Period	Form to be kept	Method of Destruction
General letters/correspondence/emails associated with the NFU	6 years	Electronic Filing / Paper Copies	Electronic Deletion / Confidential waste shredding
Delegate lists	6 years		
Minutes and Agendas of Meetings	10 years		
Diaries, notes from meetings, reports	10 years		
Board Packs	10 years		
Any other NFU associated records and documents.	10 years		
All documentation as detailed above to be destroyed when Officeholder leaves post or forward to successor. If there are documents Officeholders deem worthy of retaining e.g. Of historical importance, please contact the Regional Office in the first instance for advice.			

The NFU has a supplier for the disposal and shredding of large amounts of confidential waste. Please contact the Regional Office in the first instance.

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Guidance for the management of NFU documents and records

- Store information electronically rather than keeping paper copies wherever possible.
- Only store information on a device that has the appropriate security protection and is password protected.
- Ensure that the records are easily identifiable (name files and folders consistently) and dated, in order that files can be located easily and destroyed at the end of their retention period. This includes managing emails.
- Emails are not a secure form of communication. If you need to send personal or confidential information consider how to do so securely. Large amounts of data can be sent using Secure File Transfer.
- Be aware of data breaches that can accidentally happen. E.g. disclosure of personal data in an email sent to the wrong person, or unauthorised disclosure of personal data being passed from one Officeholder to another.

For further advice please contact ComplianceTeam@NFU.org.uk