

Data protection, recordkeeping & archiving

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What are the risks?

- If we don't keep data secure
- If we lose data?
- If we don't keep records?
- If we don't archive records?

What are the main risks in the following scenarios?

- 1.** A roleholder sends the entire AM contact list (names and contact details of members & attenders) to the wrong person – it is a personal friend whose email is similar to the clerk's. They have no connection to Quakers.
- 2.** The AM contact list is made publicly available online via the new Meeting website due to a fault with the login page.

Vote 1 or 2 in the chat for which you think is the higher risk!

What are the main risks in the following scenarios?

3. One of the meeting houses has had some substantial re-wiring done by a local electrician. The Friend managing the process has not kept any of the documentation from the electrician including emails agreeing a schedule of work, quotes for the work, invoices for payment etc

4. The AM employs an admin person for five years. Their contract ends in January and a Trustee immediately clears out all the files relating to their employment for data protection reasons as they no longer work there.

Vote 1 or 2 in the chat for which you think is the higher risk!

Data Protection basics

- Treat others personal data as you would wish yours to be treated
- The Area and local meetings can reasonably be expected to use the personal data of their members for certain types of contact
- Take reasonable measures to keep data secure
- Data Protection does **not** mean that you can't record names in minutes or that you cannot archive personal information

Record keeping basics

- Understand what data you have is a business record – a record of something important, a contract, a payment or decision. Then think about how long it needs to be kept to support that activity (6-10 years may be good general rule of thumb). Also what is required by charity law (annual reports & accounts).
- Create simple processes so that business records can be kept centrally and access maintained over time – this could still be paper files in a filing cabinet or a simple cloud-based solution with some guides on use and access
- Create simple guidance for roleholders on what they need to save & how
- Think about any high-risk activity such as safeguarding and seek advice

Archiving basics

Qf&p 4.40: It is advised that the following be preserved in Friends' ownership or custodianship:

- **minute books of yearly, general, area and local meetings;**
- **minute books of elders and overseers and of standing committees of meetings for church affairs;**
- **official registers of members (11.37), printed lists of members and attenders (11.39), marriage registers (16.62), registers of burials (17.12), burial ground plans (14.31), registers of properties and trusts (15.18);**
- such other documents as it is reasonable to expect may be needed for future reference.

Even if your meeting has moved to digital cloud storage, archiving hasn't actually changed in past 20 years – print the important documents regularly and archive them with your place of deposit.

Any questions? And useful links!

- BYM Data Protection advice for meetings: <https://www.quaker.org.uk/our-organisation/support-for-meetings/data-protection>
- BYM advice on records & archives: <https://www.quaker.org.uk/our-organisation/quaker-roles/records-custodians-librarians>
- Records Management in Charities: A Toolkit for Improvement: <https://www.voluntarysectorarchives.org.uk/wp-content/uploads/2017/06/records-management-in-charities-9.pdf>

Really good guide with lots more useful links at the end! Remember to scale it to your organization (much of the self-assessment will not apply)

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