

London District Data Audit and Consent Guidance (reviewed June 2025)

Business Function	Whose data do we hold?	What data do we hold on them?	Purpose of processing	Article 6 lawful basis for processing personal data	What is the connection between the individual and the District (category)	Will we share this data with anyone else (recipient)	Would the individual expect the processing of their data to occur	How is the data stored?	Retention period and justification	Consent required?
Human Resources	Employees of District	contact details	To hold an active postal and personal email address (to ensure that payroll and pension company are able to send salary/pension details to employee)	1c - legal obligation	employer	Stewardship – payroll The Pension Trust (TPT) – Pension provider	Yes	Electronically (District SharePoint files)	Retained during length of employment. Retained after employment in case of need to contact re. pension	No
		sensitive details such as passport/visa number; NI number; salary information	To record that the employee is legally entitled to work in the UK; for processing tax payment contributions; to record salary payments	1c - legal obligation	employer	Stewardship – payroll The Pension Trust (TPT) – Pension provider	Yes	Electronically (District SharePoint files)	Retained for length of employment and then disposed of after 3 months of leaving date	No
		DBS – see safeguarding section below								
		Professional indemnity Insurance	For those roles that require enhanced insurance protection	1c – legal obligation	Employer	Methodist Insurance	Yes	Electronically (District SharePoint files)	Current tax year +6 years (or duration of employment +6 months – whichever is greater)	No
		Employee tax, pension and insurance records	To record the District's financial and legal obligations towards an employee	1c – legal obligation	employer	HMRC if required	Yes	Electronically (District SharePoint files)	Current tax year + 6 years (or duration of employment – whichever is greater)	No
		Contractual information	To hold an active legal account of employment	1b - contractual basis	employer	Auditors	Yes	Electronically (District SharePoint files) and hard copy filing	Retained during length of employment, may be subject to amendment. Retained for up to a year after employment.	No
		Bank details	To ensure payment for employment	1b - contractual basis	employer	Stewardship (payroll); Auditors	Yes	Electronically (District SharePoint files)	Retained for length of employment	No
		Pensions	To ensure pension benefit supplied to employees	1b - contractual basis	employer	Stewardship – payroll company; The Pension Trust (TPT) - pension provider	Yes	Electronically (District SharePoint files)	Current tax year + 6 years (or duration of employment – whichever is greater)	No (but employee can opt out of pension)
		Application form including past employment details and references	To process interview for position and manage successful recruitment	1c - legal obligation	employer	Application form may be shared with an external person who will sit on the interview panel. Personal data from the candidate will not be shared	Yes	Electronically (District SharePoint files)	Successful applications retained during employment	No

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		Probationary reflections	To conclude individuals' probationary period, determining whether probation is concluded; learning lessons for employee and employer	1f - legitimate interest	employer	No	Yes	Electronically (District SharePoint files) and hard copy filing	Retained for length of employment (and up to 1 year thereafter, if employee does not have an appraisal)	No
		Appraisal information	To review staff members performance over the year and look forward to coming year challenges and opportunities	1f - legitimate interest	employer	No	Yes	Electronically (District SharePoint files) and hard copy filing	Retained for length of employment and up to 1 year thereafter	No
		Performance improvement plans	A tool for ongoing performance improvement and support, if required	1f - legitimate interest	employer	Information may be shared with disciplinary committee / District Council if required	Yes	Electronically (District SharePoint files) and hard copy filing	Retained for length of employment and up to 1 year thereafter	No
		Sick leave	To record employees sick leave	1c - legal obligation	employer	Disciplinary committee / District Council / Auditors / response to reference requests (figures only) / Stewardship (payroll) for sick pay purposes	Yes	Electronically (District SharePoint files) and hard copy filing	Retained for length of employment (or up to four years) and then up to one year after employment has ended	No
		Annual leave (or other leave)	To record employees leave entitlement	1c - legal obligation	employer	Disciplinary committee / District Council / Auditors	Yes	Electronically (District SharePoint files) and hard copy filing	Retained for year and a half in case required for auditing	No
		Expense claims (bank details)	To reimburse out of pocket expenses	1b – contractual basis	employer	Auditors	Yes	Electronically (District SharePoint files, CAF, Xero), Hubdoc	Current tax year + 6	No
		Emergency contact information	To ensure that we have accurate emergency contact details, should it be required	1e – public interest	employer	If the situation arose, the details would be shared with emergency services	Yes	Electronically (District SharePoint files) and hardcopy kept in main locked cupboard in District Office	Retained for length of employment	No

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		Mobile numbers	To join the District WhatsApp group for important communications	1a - consent required	employer	WhatsApp and fellow staff members	Yes	WhatsApp	Retained for length of employment or until employee withdraws their consent	Yes
	Volunteers and District Office holders	contact details	To hold active contact details (email, phone and/or postal) to ensure the volunteer can fulfil their role and be supported by the District Team	1f – legitimate interest	voluntary support	Certain roles, data may be shared with the Connexional Team	Yes	Electronically (District SharePoint files)	Retained during length of volunteering and retained after for up to 1 year	No
		DBS – see safeguarding section below								
		Expense claims (bank details)	To reimburse out of pocket expenses	1b – contractual basis	voluntary support	Auditors	Yes	Electronically (District SharePoint files, CAF, Xero), Hubdoc	Current tax year + 6	No
		Emergency contact information for roles operating within the District Office	To ensure that we have accurate emergency contact details, should it be required	1e – public interest	voluntary support	If the situation arose, the details would be shared with emergency services	Yes	Electronically (District SharePoint files) and hardcopy kept in main locked cupboard in District Office	Retained for length of volunteering	No
	Unsuccessful recruitment applications	contact details; application form	To ensure no biased/discriminatory methods are used within selection processes and to enable feedback for the candidates	1c - legal obligation	applied for a position within the District	Application form may be shared with an external person who may make up a shortlisting and/or interview panel, but personal data from the candidate will not be shared	Yes	Electronically (District SharePoint files)	Unsuccessful applications destroyed after six months	No
	Unsuccessful applications for voluntary positions in District (e.g. office holders; conference reps etc)	contact details; application form	To ensure no biased/discriminatory methods are used within selection processes and to enable feedback for the candidates	1 c – legal obligation	applied for a position within the District	No	Yes	Electronically (District SharePoint files)	Unsuccessful applications destroyed after six months	No

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Ministry	Ministers	contact details; circuit; stationing details; pastoral care notes; probationer/early years reports	to enable the District to support Ministers in their roles through pastoral care; supervision; stationing; training opportunities etc.	1f - legitimate interest	Pastoral charge	Connexion; Mailchimp	Yes	Electronically (District SharePoint files / Microsoft Office 365), Mailchimp (third party software platform) / Beacon (District CRM system) and hard copy filing	Duration of being stationed in District and up to +6 months thereafter	No
		Who Ministers supervise or are they supervised by	to enable the District Chairs to provide required supervision of Ministers across the District and oversee the supervision of other Ministers within the District	1b – contractual basis	District's responsibility as part of the Supervision Implementation Plan	Connexion	Yes	Electronically (District SharePoint files / Google Sheets)	Duration of supervision within the London District and up to +12 months thereafter	No
		Supervision notes as supervisor or as third-party overseer	to enable the District Chairs to provide required supervision of Ministers across the District and oversee the supervision of other Ministers within the District	1b – contractual basis	District's responsibility as part of the Supervision Implementation Plan	When new Supervisors are allocated, the Ministers Supervision file may be sent to them securely	Yes	Electronically (District SharePoint files) – protected files	Duration of supervision within the London District +12 months	No
		contact details; circuit; District committee membership	to enable the District as a whole to contact and support Ministers for preaching; church; circuit support	1f – legitimate interest	Pastoral charge	Printed annually in Directory and provided to connexion; Synod representatives; Circuit Administrators; District Staff and office holders	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	Duration of being stationed in District	No
		Names of Superintendent Ministers	Named on the District website to offer transparency to visitors to the District	1f – legitimate interest	District oversees and supports the work of the Superintendents	Publicly available on the website	Yes	Wix	Duration of the Minister being Superintendent within the London District	No
		Safeguarding details – see safeguarding section								

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		Event registration details	To enable the District to know attendance at events; to communicate relevant details for the event; to communicate any follow up required	1f – legitimate interest	Individuals have signed up to attend the event	Connexion	Yes	Electronically (District SharePoint files); Beacon (District CRM system); Tockify	Up to three months after the event	No
			Consent to hold sensitive data, such medical access information/dietary requirements; photo/recording permissions	1a – consent required	Individuals have signed up to attend the event	Dietary requirements and/or physical access issues may be disclosed to event venue organiser and catering	Yes	Electronically (District SharePoint files); Beacon (District CRM system); Tockify	Consent held for up to 6 months after event for access and medical requirements; consent held for up to two years (repeated if necessary) until archived	Yes
	District Committee membership	Dates of holding membership	To retain Committee membership details; offer support within the District	1f - legitimate interest	Serving on District Committee	Connexion; District Directory	Yes	Electronically in Beacon (District CRM system)	Retained for duration of being stationed in District	No
		District Office Holder	Email addresses published on website	1a - consent required	Serving on District Committee	Publicly available; Wix	Yes	Electronically on Wix server	Retained for duration of holding position	Yes
	Elected Methodist Conference Reps	Contact details; length elected as rep; application form to stand as representative	In order to provide the representatives with conference details to fulfil their role of representing the District	1f - legitimate interest	Representing District	Connexion; District Directory; data appears on the ballot paper given to Synod members (not contact details)	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	Until elected duration of service has ended, and up to one year following; For unsuccessful applicants on ballot paper, details are kept for a year	No
Lay	Employees of Circuit / Churches	contact details; hours worked for circuit employees	District supports Circuits/Churches and provides bridge between them with Connexion; provision of church fund assessment on annual basis to Connexional team	1f - legitimate interest	Overview for employment within the District	Connexion / District HR Group / Mailchimp (email address only)	Yes	Electronically (District SharePoint files / Microsoft Office 365), District Directory and hard copy filing	Updated annually	No
	Office holders in Church / Circuit	contact details; position (s) held for circuit employees. For safeguarding positions – see safeguarding section.	District provides support and training opportunities across London	1f - legitimate interest	District provides essential information for their specific role from the Connexion; training opportunities from the District	Connexion; Mailchimp	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	Retained during service and thereafter deleted	No

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		Name, details of role and contact details	Supporting evidence to connexional team to provide	1f – legitimate interest	District operates as conduit to share relevant information between the two parties	Connexional Team	Informed when collating information	Electronically (District SharePoint files) / Beacon if the information is relevant to other data held	Retained until handed over to the connexional team, or data is held for other purposes related to other reasons on this Data Map	No
		contact details; position (s) held	To offer transparency for the District support opportunities across the District for Churches/Circuits printed within the Directory	1a - consent required	Serving on Circuit/Church group or position	District Directory	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	For duration of holding position(s)	Yes (to print the data)
	Lay employees/volunteers in Supervision	Who Lay individuals supervise or are supervised by	to enable the District Chairs to provide required supervision of relevant Lay peoples across the District	1b – contractual basis	District's responsibility as part of the Supervision Implementation Plan	Connexion	Yes	Electronically (District SharePoint files / Google Sheets)	Duration of supervision within the London District and up to +12 months thereafter	No
		Supervision notes as supervisor or as third-party overseer	to enable the District Chairs to provide required supervision of Lay peoples across the District	1b – contractual basis	District's responsibility as part of the Supervision Implementation Plan	When new Supervisors are allocated, the Lay Supervision file may be sent to them securely	Yes	Electronically (District SharePoint files) – protected files	Duration of supervision within the London District +12 months	No
	Office holders in District	contact details; position (s) held	To retain Committee membership details; offer support within the District	1 f - legitimate interest	Serving on District Committee	Connexion; Regional Team; Mailchimp	Yes	Electronically (District SharePoint files / Beacon (District CRM system)) and hard copy filing	Retained for duration of holding position	No
		contact details; position (s) held	To offer transparency for the District support opportunities across the District for Churches/Circuits	1a - consent required	Serving on District Committee	District Directory	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	For duration of holding position(s)	Yes (to print the data)
		Email address published on website	To offer transparency for the District support opportunities across the District for Churches/Circuits	1a - consent required	Serving on District Committee	Publicly available; Wix	Yes and No	Wix	For duration of holding position(s)	Yes
	Lay people	Safeguarding details – see safeguarding section								

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		Event registration details	To enable the District to know attendance at events; to communicate relevant details for the event; to communicate any follow up required	1f – legitimate interest	Individuals have signed up to attend the event	Connexion	Yes	Electronically (District SharePoint files); Beacon (District CRM system); Tockify	Up to three months after the event	No
		Event registration details	Consent to hold sensitive data, such as medical access information/dietary requirements; photo/recording permissions	1a – consent required	Individuals have signed up to attend the event	Dietary requirements and/or physical access issues may be disclosed to event venue organiser and catering	Yes	Electronically (District SharePoint files); Beacon (District CRM system)	Consent held for up to 6 months after event for access and medical requirements; consent held for up to two years (repeated if necessary) until archived	Yes
	Elected Synod Reps	Contact details	In order to provide the representatives with Synod details as the elected reps from their Circuit (or District reps)	1f - legitimate interest	Attendance at bi-annual Synod	Printed in District Directory (see below)	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing	Retained while elected by Circuit	No
	Office holders in Circuits/Districts	Contact details	To print in the District Directory annually	1a – consent required	Hold a role within the District or the Circuit	Printed so technically shared with whomever may read Directory; participants in the Directory; Connexion	Yes	Electronically (District SharePoint files); Beacon (District CRM system) and printed hardcopy	District copy archived	Yes
	Elected Methodist Conference Reps	Contact details; length elected as rep; application form to stand as representative	In order to provide the representatives with conference details to fulfil their role of representing the District	1f - legitimate interest	Representing District	Connexion	Yes	Electronically (District SharePoint files); Beacon (District CRM system) and hard copy filing	Until elected duration of service has ended and up to one year following	No
Safeguarding	Employees of the District	DBS	For those roles that require an enhanced criminal record check via the DBS service because the role may bring them into direct contact with children or vulnerable adults and/or sensitive information	1c – legal obligation	Employer	Connexion	Yes	Electronically (District SharePoint files) and DBS system (third party)	Retained 75yrs+	No

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	Volunteers and District Office holders	DBS	For those roles that require an enhanced criminal record check via the DBS service because the role may bring them into direct contact with children or vulnerable adults and/or sensitive information	1c – legal obligation	Voluntary support	Connexion	Yes	Electronically (District SharePoint files) and/or Beacon (District CRM system) and DBS system (third party)	Retained 75yrs+	No
	LAY AND MINISTERS: Training	Registration details to confirm attendance with date attended and outcomes of the course. And name of church and circuit of the applicant.	To ensure that the District holds proof of training.	1c - legal obligation	individual has applied for the training course being run by the District	Connexion; London Regional Learning & Network Team; Circuit	Yes	Electronically (District SharePoint files); Beacon (District CRM system); Theology X (third party software platform)	Retained 75yrs+	No
	MINISTERS: safeguarding details	DBS; training dates and refresher indicator; for Ministers within London District	to retain necessary safeguarding information on Ministers as duty of care	1c - legal obligation	Pastoral charge and District is legally responsible	Connexion; Districts; Circuit; Church	Yes	Electronically (District SharePoint files) / Beacon (District CRM system), DDC (DBS provider) and hard copy filing	Retained 75yrs +	No
		Safeguarding complaints/reports on Ministers within London District	to retain necessary safeguarding information on Ministers as duty of care	1c - legal obligation	Pastoral charge and District is legally responsible	Connexion; Districts; [Circuit/Church where and when appropriate]; [legally responsible third parties, e.g., police; local authorities where and when appropriate]	Yes (No in the cases of more extreme safeguarding reports)	Secure Electronically (District SharePoint files), Methodist MyConcern (shared space used by Connexion to records Safeguarding concerns) and hard copy filing	Retained 75yrs +	No

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		DBS; training dates and refresher indicator for Ministers who have left London	To ensure that the District complies with providing the correct details for the stationing appointment for Ministers and retains for necessary duty of care	1c - legal obligation	Connexional responsibility	Connexion; Districts; Circuit; Churches	Yes	Electronically (District SharePoint files) / Beacon (District CRM system) and hard copy filing in archived state	Retained 75yrs +	No
		Safeguarding complaints/reports on Ministers who have left London	To ensure that the District complies with providing the correct details for the stationing appointment for Ministers and retains for necessary duty of care	1c – legal obligation	Connexional responsibility	Connexion; Districts; [Circuit; Church where and when appropriate]; [legally responsible third parties, e.g., police; local authorities where and when appropriate]	Yes (No in the cases of more extreme safeguarding reports)	Secure Electronically (District SharePoint files) and hard copy filing in archived state; Methodist MyConcern (shared space used by Connexion to records Safeguarding concerns)	Retained 75yrs +	No
	LAY: safeguarding details	DBS; training dates and refresher indicator on lay employees or volunteer office holders	to retain necessary safeguarding information as duty of care	1c - legal obligation	Pastoral charge and District is legally responsible	Connexion; Districts; Circuit; Church	Yes	Electronically (District SharePoint files) Beacon (District CRM system) and hard copy filing	Retained 75yrs +	No
		Safeguarding complaints/reports on lay employees or volunteer office holders	to retain necessary safeguarding information as duty of care	1c - legal obligation	Pastoral charge and District is legally responsible	Connexion; Districts; [Circuit; Church where and when appropriate]; [legally responsible third parties, e.g., police; local authorities where and when appropriate]	Yes (No in the cases of more extreme safeguarding reports)	Secure Electronically (District SharePoint files); Methodist MyConcern (shared space used by Connexion to records Safeguarding concerns) and hard copy filing	Retained 75yrs +	No

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		Circuit and church safeguarding officers: name and contact details	District provides support and training opportunities across London and has oversight over safeguarding practices	1f - legitimate interest	District provides essential information for their specific role from the Connexion; training opportunities from the District or DMLN	Connexion; Districts; Circuit; Church; police; local authorities;	Yes	Electronically (District SharePoint files; Beacon (District CRM system); Mailchimp) and hard copy filing	Retained name of SO for 75yrs, and contact details retain for length of service or length of any potential investigation	No
MINISTERS AND LAY: safeguarding concerns/risk assessments/complaints		DBS blemishes – DBS certificate; risk report and recommendations made, record of correspondence, information relating to criminal conviction history, contact details for those interviewed, auditing information	Duty of care to provide safeguarding for churches and congregations	1c – legal obligation	District is legally responsible	Connexion; Districts; [Circuit; Church where and when appropriate]; [legally responsible third parties, e.g., police; local authorities where and when appropriate]	Yes (No in cases of extreme safeguarding reports)	Electronically (District SharePoint files (restricted access); Beacon (District CRM system)); Methodist MyConcern (shared space used by Connexion to records Safeguarding concerns) and hard copy filing	Retained for 75 years after appointment/employment ceases / confirmation of blemished DBS details	No
		Contact details for those Ministers and/or Lay individuals on Monitoring and Support Groups	Duty of care to provide safeguarding for churches and congregations	1f – legitimate interest	District is legally responsible	Connexion; Districts; [Circuit; Church where and when appropriate]; [legally responsible third parties, e.g., police; local authorities where and when appropriate]	Yes	Electronically (District SharePoint files) Beacon (District CRM system) and hard copy filing	Retain for 75 years after the conclusion of the matter	No
		Necessary data to prevent death or serious harm	Duty of care to provide safeguarding for churches, congregations and general public. See Information Sharing Agreement	1e- public interest	District is legally responsible	Connexion and law enforcement	No	MyConcern (shared space used by Connexion to records Safeguarding concerns)	Retain for 75 years after the conclusion of the matter	No

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	AUDITING: individuals completing self-audits for circuits and churches	Contact details	To ensure the District has oversight of safeguarding practices	1f – legitimate interest	Pastoral charge	Connexion; Districts; Circuits; Churches; [legally responsible third parties, e.g., police; local authorities; charity commission where and when appropriate]	Yes	Electronically (District SharePoint files) Beacon (District CRM system) and hard copy filing (locked)	Retained for 75yrs after conclusion of audit	No
Public	Methodist Ministers or congregations outside of London or third parties etc.	Names; email addresses	In order to circulate training opportunities within the District; to promote the good news of the District	1a - consent required	They have subscribed to District Newsletter	No	Yes	Electronically on Mailchimp; Server; Beacon (District CRM system)	Until they notify us otherwise (can unsubscribe through the District Newsletter or via the office); if consent is not renewed, we will remove	Yes
	Third Party room bookings	Names; email address; telephone number; (bank account details if external org has booked refreshments for a room)	In order to process room bookings for third party arrangements that are beyond the normal District meetings, including invoicing if refreshments are ordered	1b - contractual basis	District are providing meeting room facilities	Central Hall Events team	Yes	Electronically (District SharePoint files); invoicing details retained in CAF and Xero	Three months following booking if unique user; up to one year for continuous users after last booking; financial information retained for up to seven years	No
	Contractors / Service Provider	Names; contact details; bank details	To hire contractor or service to undertake work or provide a service within the District office or at District properties	1b - contractual basis	District hiring contractor/third party	If we were asked to promote their services, then their details may be shared; auditors for spot-checking when needed	Yes	Electronically (District SharePoint files) and in some cases in hardcopy (locked in cupboard); CAF; Xero; Hubdoc	Financial information kept for up to seven years; other information retained for one year following closure of contract (unless warranty requires longer retention)	No