

Type Of Record	Retention Period	Storage Media Location	Reason for Retention
<i>Organisational Records</i>			
Annual Accounts & Annual Review	Permanent	Electronic/Physical	
Audit Reports and Financial Records inc. Payroll & Legacy Data, Pension Data	6 years	Electronic	
Invoice – Capital Item	10 years	Electronic	
Contracts and Joint Venture Agreements	6 years after expiry of contract	Electronic	
Board Reports, Board Minutes	Permanent	Electronic	
Corporate Risk Register	20 years	Electronic	
Employers' Liability Insurance Certificate	40 years	Electronic	
Insurance Data	3 years after lapse/settlement	Electronic	
Health & Safety Records	3 years (unless hazardous = permanent)	Electronic	
Policy Statements	Permanent	Electronic	

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<i>Personal Data</i>			
Service User Data	Up to 12 years	Electronic	To comply with our contractual obligations when delivering commissioned services. For continuity of service.
Training Records (externally delivered)	6 years	Electronic/Physical	Essential business continuity
Staff Emails	Up to 6 years	Electronic	Essential business continuity
Recruitment data	12 months post application	Electronic/Physical	For monitoring purposes & HR compliance
Volunteer Records & Data	1 year post cessation of volunteering	Electronic/Physical	For supply of references
Employee/Personnel Records	6 years after employment ceases	Electronic/Physical	For references and business continuity
Incidents, Complaints Data (including accident data)	7 years	Electronic/Physical	To comply with Charity Commission guidance
Membership forms	Maintain for all active members	Physical	Essential business continuity

Membership info	Up to 2 years after the member leaves	Electronic	Essential business continuity
Fundraisers and donors	Up to 6 years	Electronic/Physical	To comply with Charity Commission guidance
Tax including Gift Aid	6 years	Electronic	To comply with HMRC regulations