



Data Retention Policy

Date	Revised By:	Summary
28.4.2018	Board of Trustees	DF Organisational Policy: General

Data Retention Policy

Dyspraxia Foundation requires that different types of records be retained for a specific period of time to comply with UK legislation and good practice. Dyspraxia Foundation requires that records be treated consistently. All records whether physical or digital are covered by this policy.

This policy is intended to ensure that Dyspraxia Foundation meets its obligations under the Data Protection Act 1998 and keep records and documents only for as long as necessary. Data is cleansed each year according to this schedule.

Organisational Records

Type of Record	Retention Period	Storage Media Location	Reason for Retention
Membership	2 years	Physical	
Membership	5 years	Electronic	
Events	2 years	Physical/Electronic	
Accounts (final signed copies)	Permanent	Physical/Electronic	
Annual Review	Permanent	Physical/Electronic	
Financial/Tax/Gift Aid/Payroll/Shop	7 Years	Physical/Electronic	
Board Agenda/Reports	Permanent	Electronic	
Signed Minutes	Permanent	Electronic/Physical	
Contracts & Joint Venture Agreements (BDA/Lottery/ACLF etc)	7 years after expiry of contract	Electronic/Physical	
Corporate Risk Register	Permanent	Electronic	
Employers Liability Ins Certificate	40 years	Electronic	
Health & Safety Records	7 years	Electronic/Physical	
Insurance Data	7 years after lapse or settlement	Electronic	
Invoices for Capital Items	10 years	Electronic/Physical	
PAT Test Reports	7 years	Electronic/Physical	
Policies	Latest versions	Electronic/Physical	
Personal Data			
Staff Emails	9 months	Electronic	Essential Business Continuity
Helpline Emails	3 months	Electronic	Essential Business Continuity
Volunteer Records	1 year post cessation	Electronic/Physical	For supply of references
Personnel Records Staff inc. payroll/pensions/training	7 years after employment ceases	Electronic/Physical	For references and business continuity
Incidents/Complaints	7 years	Electronic/Physical	To comply with Charity Commissions Guidance
Recruitment Data	6 months post application	Electronic/Physical	Monitoring and HR compliance
Fundraisers/Donors	7 years from latest donation	Electronic/Physical	Comply with Charity Commission
Trustees	Permanent	Electronic	