



ashwood
church

Record Retention Schedule

Last review date: January 2026

Next review date: January 2028

Version Control

Date	Version	Name	Description
20/01/2026	1.00	Gaye Locke	Separation from Data Retention Policy

Record Retention Schedule

To be used in conjunction with relevant policies (e.g. Data Retention Policy)

Type of Record	Retention Period
Contracts – and related documentation	7 years after expiration or termination
Corporate Records – including signed minutes of the Board and all committees, corporate seals, articles of incorporation, bylaws, annual reports, permits and licences	Permanent
Financial Information – including records of banking transactions, tax records, audits	Retention period ranges from 6 years to 10 years from the end of the relevant Financial Year in which the transaction was made, in line with regulations.
Gift Aid Records • Ongoing gift aid agreement forms • Terminated gift aid agreement forms	Permanent 7 years after the completion of the tax period
Grant Records – including proposal, agreements, modifications, correspondence, reports and any other pertinent documentation	7 years after completion of grant period
Health and Safety Assessments	6 years from time of assessment
Insurance Records – including certificates, claims files (including documentation, correspondence, etc) and expired policies	Permanent
Legal Files and Papers - Legal Memoranda and Opinions (including all subject matter files)	7 years after close of matter
Miscellaneous – including newsletters (online and paper) etc.	Paper copies and online 2 years after publication Note: a master digital copy of publications will be retained in a secure manner to provide a historical record of the life of the church
Pay and Benefits Records	Termination + 7 years
Pension Records – sufficient pension information and employee data so it can be established at all times whether any pension is payable and if so the pension amount	Permanent
Personnel and employment records • Job description and terms & conditions • Appraisal records, objectives, performance reviews or targets agreed • Development/training needs and records of completed activities.	Termination + 7 years
Personal records on church online database	Removal on request or when it is established the individual is no longer engaging with Ashwood Church
Property Records – including deeds assessments, licences, original purchase/sale/ lease agreement, property insurance policies	Permanent

Recruitment Information for Unsuccessful Applicants: Job Application Forms, CV's and other details including interview notes	1 year after unsuccessful applicant notified of outcome
CCTV Images	Unless required for evidential purposes, the investigation of crime or otherwise required by law recorded images will be retained for 30 days and then automatically overwritten