

# ChangeSchool- Information Records Retention Schedule

## Introduction

This Information Retention Policy outlines ChangeSchool's approach to retaining and deleting the information we hold in compliance with the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018.

## General Guidelines

1. **Review and Update:** This schedule should be reviewed annually and updated as necessary to reflect legal requirements and organizational needs changes.
2. **Secure Disposal:** Records should be disposed of in a manner that protects sensitive information from unauthorized access.
3. **Archiving:** Certain documents may be archived beyond their retention period if they have historical value or are required for long-term studies.

## 2. Purpose

The purpose of this policy is to ensure that our organization:

- Complies with legal and regulatory requirements under UK GDPR.
- Manages data storage costs effectively.
- Protects the privacy and security of data subjects by retaining personal data no longer than necessary.

## 3. Scope

This policy applies to all employees, contractors, and third parties who handle data on behalf of [Organization Name], specifically data stored and processed within AWS environments.

## 4. Data Retention Principles

In aligning with UK GDPR requirements, our data retention practices are governed by the following principles:

- **Lawfulness, Fairness, and Transparency:** Data is retained for legitimate purposes as transparently communicated to data subjects.
- **Purpose Limitation:** Data is kept for specified, explicit purposes and not used in a way incompatible with those purposes.
- **Data Minimization:** Only data necessary for the purposes stated at the time of collection is retained.
- **Accuracy:** Efforts are made to ensure that the data retained is accurate and up to date.
- **Storage Limitation:** Data is kept in a form that permits the identification of data subjects for no longer than necessary for the purposes for which the personal data are processed.
- **Integrity and Confidentiality:** Data is securely stored and managed to prevent unauthorized access and loss.

## Retention Schedule

### 1. Corporate Records

- **Articles of Incorporation, Bylaws, and Board Meeting Minutes:** Retain permanently
- **Annual Reports:** Retain for seven years
- **Legal Documents and Contracts:** Retain for seven years after termination

### 2. Financial Records

- **Tax Returns and Audits:** Retain permanently
- **Bank Statements, Invoices, and Expense Reports:** Retain for seven years
- **Payroll Records:** Retain for seven years

### 3. Employee Records

- **Personnel Files:** Retain for seven years after termination
- **Training Records:** Retain for five years after termination
- **Benefits Information:** Retain for six years after termination

### 4. Customer Records

- **Contracts and Agreements:** Retain for seven years after termination
- **Customer Correspondence:** Retain for five years
- **Account Records:** Retain for seven years after the last transaction
- **Customer's user data:** In accordance with the guidelines provided by the customer

### 5. Health and Safety Records

- **Accident Reports:** Retain for ten years
- **Health Records:** Retain for the duration of employment plus 30 years

### 6. Project Files

- **Project Documents and Contracts:** Retain for seven years after project completion
- **Reports and Analyses:** Retain for five years after project completion