

## DATA RETENTION POLICY

Engineering Trust Training Ltd (ETT) provides apprentice recruitment and training services to the engineering industry. These activities require documents and data to be retained for the time required by law or by the data retention clauses within current and past contracts.

ETT acknowledges, even where information is not covered by the data protection act, that its principles mean that information should be adequate, relevant, not excessive, accurate, up to date and not kept for longer than is necessary.

Information/document type	Retention period
<b>Learner Applications &amp; Reports</b>	
Application forms (successful)	12 years
Assessment test results (successful)	12 years
Application form (un-successful) <sup>2</sup>	18 months
Assessment test results (un-successful)	18 months
Interview notes	1 year
Funding/financial information	12 years
Course management/support/H&S	Indefinitely
<b>Government Funding</b>	
SFA Contracts	12 years
ILR forms	12 years
Apprenticeship Agreements	12 years
Learner reviews	12 years
E-store/Smart Assessor learner files	12 years
AGE grant records	12 years
<b>Governance</b>	
Trust Deeds & governing documents	Indefinitely
AGM Minutes	7 years
Board meeting minutes	7 years
<b>Accounting &amp; Finance</b>	
Sales Purchase ledgers	7 years
Annual audit reports	Indefinitely
Annual accounts	7 years post completion
Annual Financial statements	Indefinitely
HMRC records	7 years
Credit card records	7 years
Nominal ledgers	7 years
Electronic payment records	7 years
Pension records	7 years
Payroll & staff expenses	7 years
Lease agreements	Length of lease and 1 year
<b>Subcontracted Delivery</b>	
Service level agreements	12 years
Audit reports	12 years
Meeting Minutes	12 years

Learner reviews	12 years
<b>Employee Documents</b>	
Employer files	Termination + 2 years
Employment applications	1 year
Team meeting minutes	1 year
Disciplinary records	6 months - 2 years (policy dependant)
Training records	Termination + 2 years
<b>Property Records</b>	
Lease agreements	Term + 2 years
Council tax records	2 years
Property insurance	2 years
Waste disposal records	3 years
<b>General</b>	
Accident records	Indefinitely
Safeguarding records	Indefinitely
Health & safety assessments	Indefinitely

### How to contact us

If you want to request further information about how or why we retention data, please contact us:

The Engineering Trust Training Ltd, The Engineering Skills Academy, 11 Wedgwood Road, Bicester, Oxon, OX26 4UL.

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