MOUNTVIEW

Data Retention Policy

Mountview requests, generates, processes and stores a range of personal data during the conduct of its business. The basis for this is set out in Mountview's Privacy Notice. The Data Retention Policy describes the kinds of data which Mountview stores, and the length of time for which they will be retained.

Where stored data items have reached the end of their retention period and need to be destroyed, anonymised statistical data derived from those items may continue to be retained as a historical record.

1. Student Admissions and Administration

Data Type	Dept. Responsible	Retention Period
Digital application forms including details such as name, photo ID, biographical data, contact details, educational history **(unsuccessful applicants and successful applicants who do not enrol)**	Registry	Target start date + 1 year
Hard copies of audition / interview panel notes and mark sheets **(unsuccessful applicants)**	Registry	Target start date
Application information including name, photo ID, biographical data, contact details, educational history **(enrolled students)**	Registry; Student Services	Basic information (legal name, date of birth, course) retained indefinitely Date of leaving/graduation + 6 years
Enrolment forms and supporting documentation	Registry; Student Services	Date of leaving/graduation + 6 years
Tuition fee invoices and receipts	Finance; Registry	Date of leaving/graduation + 6 years
Student loan calculations and payments	Finance; Registry	Date of leaving/graduation + 6 years
Bursaries and Scholarships: applications and correspondence	Registry; Development	Indefinitely, unless you tell us otherwise
Bursaries and Scholarships: transactions	Finance; Development	Indefinitely, unless you tell us otherwise

Emergency Fund: applications and correspondence	Registry; Finance	Current financial year + 6 years
Student health and welfare records	Student Services; Student Welfare	Date of leaving/graduation + 6 years
Student attendance monitoring	Student Services	Current period + 6 years
Student withdrawal / interruption of study requests and accompanying documentation	Academic Services	Current period + 6 years
Student disciplinary records (non-academic)	Student Services	Settlement of case + 10 years

2. Learning, Teaching and Quality Assurance

Data Type	Dept. Responsible	Retention Period
Student Awards and Prizes	Development; Registry; Student Services	Permanent
Student and Alumni Headshots	Marketing	Indefinitely, unless you tell us otherwise
Student disciplinary records (academic)	Student Services	Settlement of case + 10 years
Assignments / coursework / projects	Student Services; Course Leader	End of relevant academic year
Written and recorded feedback and progress and evaluation reports for students	Student Services	Date of leaving/graduation + 6 years
Minutes of examination board meetings	Student Services; Quality & Compliance	Permanent
Assessment marks (module level)	Student Services	Permanent
Course admin documents and correspondence	Student Services	Cohort target end date + 6 years

3. Advancement

Data Type	Dept. Responsible	Retention Period
Alumni membership and contact records	Advancement	Indefinitely, unless you tell us otherwise
Alumni donation records	Development; Finance	Indefinitely, unless you tell us otherwise
Contact details of donors and engaged prospects	Development	Indefinitely, unless you tell us otherwise
Donation transactions	Development; Finance	Indefinitely, unless you tell us otherwise
Membership records	Advancement; Finance	Indefinitely, unless you tell us otherwise
Guest lists for significant donor/fundraising events	Development	Indefinitely, unless you tell us otherwise
Customer data relevant for marketing purposes	Marketing	After 5 years of inactivity
Customer personal data relevant for booking shows and events	Marketing; Box Office	Ongoing, with individual's agreement (obtained at the point of collection), until you tell us otherwise

4. Mountview Exams

Data Type	Dept. Responsible	Retention Period
Examination Records	Mountview Exams	Permanently
Customer contact details	Mountview Exams	Current + 6 years
Examiner contact details	Mountview Exams	Current + 6 years
Written feedback for Performers	Mountview Exams	Current + 6 years
Video recordings	Mountview Exams	Date of exam + 1 year
Reasonable Adjustment and Special Consideration applications, supporting documents and records	Mountview Exams	Current + 6 years
Centre Registration Agreements	Mountview Exams	Termination of agreement + 6 years
Contracts, agreements and supporting documentation	Mountview Exams	Termination of contract + 6 years
Minutes of Examinations Meetings and Committee Meetings	Mountview Exams	Permanent
Financial data and documents	Mountview Exams	End of relevant financial year + 6 years
Customer correspondence	Mountview Exams	Current + 6 years
Scheduling and results processing data and documentation	Mountview Exams	Current + 3 years
Examiner training, moderation and standardisation records	Mountview Exams	Current + 6 years unless superseded or termination of contract / agreement

5. Finance, People & Culture and Facilities

Data Type	Dept. Responsible	Retention Period
Leases	Finance; Facilities	Lease term + 6 years
Contracts/ Agreements	Finance; Student Services	Contract + 6 years
Purchase Orders	Finance	Current financial year + 6 years
Budget and management accounts working papers	Finance	Current financial year + 1 year
Conveyances and deeds	Finance	Permanent, or until sale or disposal
BACS reports	Finance	Current financial year + 6 years
Invoices	Finance	Current financial year + 6 years
Journals	Finance	Current financial year + 6 years
Credit card reports	Finance	Current financial year + 6 years
Payroll	Finance; People & Culture	Current tax year + 6 years
Tax	Finance	Current tax year + 6 years
HR data (incl. CVs and other personal information) on unsuccessful candidates for employment	People & Culture	End of recruitment activity + 6 months.
Employment contracts and related documents which record details of the individual's employment, including right-to-work and visa information	People & Culture	During term of employment + 7 years
Payroll & wage records	Finance; People & Culture	During term of employment + 7 years
Employee bank details	Finance	Delete as soon as possible after final payments made at end of employment
Staff security access passes and ID Cards	Operations	During term of employment + 1 year
Microsoft office 365 Mountview guest for sessional and freelance staff	IT	During term of employment only

6. Information Services

Data Type	Dept. Responsible	Retention Period
Enquiry via web form	Welcome Team	Retained only until information passed into relevant business system
Library accessions	Library	As per library collection policy
Mountview business systems, incl email and network storage	IT	Overnight backups retained for 1 year. For Data stored in our systems not falling into the categories listed in this document, Data is retained for as long as it is required for.
Cloud-based business systems	IT	Mirrored backups retained for 1 year. For Data stored in our systems not falling into the categories listed in this document, Data is retained for as long as it is required for.

7. Governance and Management

Data Type	Dept. Responsible	Retention Period
Audit files	Finance	Retain until completion of next audit of that topic
Audit reports	Finance	Retained in compliance with the appropriate statutory requirement
Board of Trustees and its sub-committees: minutes and papers	Principal	Permanent
Academic Board and its sub-committees: minutes and papers	Student Services; Quality & Compliance	Permanent
Working groups	Various, as appropriate	Until work of group has been completed

Copyright registrations	Principal	Permanent
Environmental Studies	Principal	Permanent
Insurance contracts, policies, claims, applications, disbursements	Principal	Permanent; completion of claim + 6 years
Real estate documents (including loan, mortgage contracts, deeds)	Principal	Permanent
Trademark registrations, evidence of documents	Principal	Permanent
Warranties	Principal	Duration of warranty + 7 years
Contracts	Principal	Permanent if current (7 years if expired)
Records documenting legal support, representation and litigation	Principal	Settlement of case + 12 years
Articles of Association	Principal	Permanent
Regulations and Policies	Principal; Student Services	Permanent until superseded; then 6 years
Health & Safety Inspections / Audits	Facilities & Operations	6 years from end of inspection
Health & Safety – Accident & Near Miss Reports	Facilities & Operations	At least 4 years from the date of report

8. Participation

Data Type	Dept. Responsible	Retention Period
Information about activities and projects	Participation	Indefinitely
Application data for those enrolling for activities	Participation	Completion of course/activity + 6 years
Application data for bursaries	Participation	Completion of course/activity + 6 years
Attendance registers	Participation	Completion of course/activity + 6 years
Financial records	Participation; Finance	Financial year + 6 years
Participant correspondence (incl with parent/guardian)	Participation	Completion of course/activity + 6 years
Practitioner contact details	Participation	Contract + 6 years
Practitioner contracts	Student Services	Contract + 6 years
Practitioner correspondence	Participation	Contract + 6 years
Safeguarding reports	Participation	Completion of course/activity + 6 years
Photos and videos of participants engaged in activities	Participation	Indefinitely unless you tell us otherwise

Date reviewed: March 2025
Date of next review: March 2026
Owner: Chief Operating Officer