



## Data Retention Schedule

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Date published

September 2025

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# Data Retention Schedule

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Published by:  
The Chartered Institute for the Management of Sport and Physical Activity  
Incorporated by Royal Charter  
Charity Registration Number: 1144545  
[www.cimspa.co.uk](http://www.cimspa.co.uk)  
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## Introduction

Welcome to the Chartered Institute for the Management of Sport and Physical Activity (CIMSPA) Data Retention Schedule. As the professional development body for the UK's sport and physical activity sector, CIMSPA is shaping a recognised and respected sector through its work with individual members and partner organisations. In order to carry out its business, CIMSPA requires personal data and is fully committed to respecting all personal data it collects and stores and how long for.

## Purpose

CIMSPA's Data retention schedule will provide information on the type of data CIMSPA collects and the retention period. It outlines your rights as an individual and the various definitions within the schedule.

### Contract/membership/partnership

Individuals with a live contract, membership, partnership or business interest with CIMSPA will have their data used and held by CIMSPA in accordance with its privacy statement, data protection and IT security policies and procedures.

### Contract/membership/partnership

If an individual terminates their contract, membership or partnership with CIMSPA, or no longer requires their business interest with CIMSPA, their data will be retained as per the data retention schedule below. Wherever possible, CIMSPA will pseudonymise individual records by deleting personal data and retaining membership numbers, for example. This will allow CIMSPA to manage risk and maintain business continuity.

### Opting in

Individuals who have opted-in to communication from CIMSPA will have their data used and held by CIMSPA in accordance with its privacy statement, data protection and IT security policies and procedures.

### Opting out

An individual who has opted-out of communications from CIMSPA will have their data retained as per the data retention schedule below. Wherever possible, CIMSPA will pseudonymise individual records by deleting personal data and retaining membership numbers, for example. This will allow CIMSPA to manage risk and maintain business continuity.

## How long will my data be held for?

CIMSPA will retain your details for as long as they are needed for the relevant purposes required for CIMSPA to continue operating.

CIMSPA may also retain certain records for other legitimate reasons (including after your relationship with CIMSPA has ended), for example to resolve any potential disputes, cross-check against future membership applications and to comply with other reporting and retention obligations.

For more details on how long CIMSPA keeps your data for, please review the data retention schedule:

## Data Retention Schedule

Type of data	Purpose	Personal Data	Retention Period
<b>Personal contact</b>	To allow direct communication between CIMSPA and an individual, for example for CIMSPA to service an individual's membership	Title*	10 years from last action
		Name*	10 years from last action
		Address	10 years from last action
		Job title*	10 years from last action
		Telephone number*	10 years from last action
		Email address(es)*	10 years from last action
<b>Organisation details</b>	To apply membership discounts based on employer partnership contracts and additional contact members	Employer*	10 years from last action
		Workplace*	10 years from last action
<b>Interactions with CIMSPA</b>	To facilitate interactions and requests between individuals and CIMSPA	Email communications*	10 years from last action
		Telephone conversations*	10 years from last action
		Written correspondence*	10 years from last action
<b>Financial details</b>	To enable CIMSPA to receive, make payment and record transactions between individuals or organisations and CIMSPA.	Bank details	Delete on termination
		Batch payment details - bank info included	Delete on termination
		Cheque/payment details	6 years (from end of fiscal year) from last action
		Credit/debit card details	Delete on termination
		Delivery notes	Delete on termination
		Direct Debit Mandates	Delete on termination
		Member/partner fees	6 years (from end of fiscal year) from last action
		Membership/partnership payment charge	6 years (from end of fiscal year) from last action
		Order details	6 years (from end of fiscal year) from last action

		Purchase invoice	6 years (from end of fiscal year) from last action
		Sales invoices and credits	6 years (from end of fiscal year) from last action
<b>Use of CIMSPA services</b>	To enable and record the use of and movement through online systems	Passwords	Delete on termination
		IP addresses	Delete on termination
		Username	Delete on termination
		Record of attendance at events, conferences, CPD etc.	6 years (from end of fiscal year) from last action
<b>Identification and CIMSPA support</b>	How CIMSPA identifies an individual, captures information to ensure eligibility into membership and services additional support as part of the membership benefits (for example, recording disabilities to ensure needs are met at events)	Career history (CV)	10 years from last action
		CPD	10 years from last action
		Date of birth	10 years from last action
		Disability	10 years from last action
		Ethnic origin	10 years from last action
		Gender	10 years from last action
		Qualifications*	10 years from last action
<b>CIMSPA administration</b>	Data that CIMSPA records to fulfil its business functions.	Contracts	10 years from last action
		Mailing preferences	10 years from last action
		Member/partner category*	10 years from last action
		Membership/partnership number	Life of the company
		Membership/partnership renewal date	10 years from last action
		Membership/partnership start date	10 years from last action
		Membership/partnership status*	10 years from last action
		Type of membership*	10 years from last action
<b>CIMSPA People</b>	Only applicable to CIMSPA People including employees, volunteers and contractors.	Title	6 years (from end of fiscal year) from last action
		Forename	6 years (from end of fiscal year) from last action
		Surname	6 years (from end of fiscal year) from last action
		Date of birth	6 years (from end of fiscal year) from last action
		Copies of driving licence, passport, birth certificates	6 years (from end of fiscal year) from last action
		Proof of current address, such as bank statements and council tax bills	6 years (from end of fiscal year) from last action

<b>CIMSPA People</b>	Only applicable to CIMSPA People including employees, volunteers and contractors.	Evidence of how individuals meet the requirements of the job, including CVs and references	6 years (from end of fiscal year) from last action
		Evidence of individuals right to work in the UK and immigration status	6 years (from end of fiscal year) from last action
		Address	6 years (from end of fiscal year) from last action
		Bank details	6 years (from end of fiscal year) from last action
		Contact details - telephone, email, emergency	6 years (from end of fiscal year) from last action
		Gender	6 years (from end of fiscal year) from last action
		Ethnic origin	6 years (from end of fiscal year) from last action
		Marital status	6 years (from end of fiscal year) from last action
		National insurance number	6 years (from end of fiscal year) from last action
		Nationality	6 years (from end of fiscal year) from last action
		Pension	6 years (from end of fiscal year) from last action
		Expenses claims	6 years (from end of fiscal year) from last action
		Gross salary	6 years (from end of fiscal year) from last action
		Start date	6 years (from end of fiscal year) from last action
		Tax code	6 years (from end of fiscal year) from last action
		Accident Records	3 years from last action
		Income Tax and NI	3 years (from end of fiscal year) from last action
		Maternity and Paternity	3 years (from end of fiscal year) from last action

<b>CIMSPA People</b>	Only applicable to CIMSPA People including employees, volunteers and contractors.	Salary and Pay	6 years (from end of fiscal year) from last action
		Parental Leave	3 years (from end of fiscal year) from last action
		Pension Benefits	12 years from the ending of any benefit payable
		Redundancy Records	6 years (from end of fiscal year) from last action
		Sickness Absence Records	6 years (from end of fiscal year) from last action
		Parental Consent	10 years from last action
		Grievances	6 years (from end of fiscal year) from last action
		Disciplinary Sanctions	6 years (from end of fiscal year) from last action
		Appeals	6 years (from end of fiscal year) from last action
		Unsuccessful job applications	12 months after last action
		Termination of employment	6 years (from end of fiscal year) from last action
		References	12 months after last action
		Interview records	12 months after last action
		Working time Records (including overtime, annual holiday, jury service, time off for dependents, etc)	2 years (from end of fiscal year) from last action
		DBS Checks if required	6 years (from end of fiscal year) from last action
		Criminal proceedings or convictions data	6 years (from end of fiscal year) from last action
<b>Other</b>	Other means by which CIMSPA may capture and retain data in relation to CIMSPA Membership/Partnership	Appeals*	10 years from last action
		Complaints*	10 years from last action
		Declarations of interests	10 years from last action
		Investigations*	10 years from last action
		Mailing lists	10 years from last action
		Personal data collated through survey completion	10 years from last action
		Parental Consent	10 years from last action
		Register of annual general meetings	Life of the company
		Register of directors	Life of the company
		Sanctions	Life of the company
		Subject access requests	10 years from last action

<b>Special Category Data</b>	Other data which CIMSPA may capture and retain in relation to CIMSPA Membership/Partnership	Unsubscribing lists	10 years from last action
		Other supporting docs	10 years from last action
		Data concerning health	10 years from last action
		Personal data revealing religious or philosophical beliefs	10 years from last action
		Personal data revealing trade union membership	10 years from last action
		Personal data revealing racial or ethnic origin	10 years from last action
		Personal data revealing psychographic information (perspective, beliefs, values etc)	10 years from last action

\* If a Sanction is applied, CIMSPA reserves the right to retain all data for the life of the company

## Data Deletion

CIMSPA will keep individual data in an active database for the time highlighted within the data retention schedule, to fulfil the specific purposes it was collected for. It will retain data after its initial usage for business purposes, such as serving a legal obligation. After this period CIMSPA must erase the data and will do so through anonymisation and archiving the data or through data deletion if an individual requests for their data to be deleted (see right to request deletion).

## What rights do I have?

### Right to erasure

Individuals who request to delete their data will have this deleted in accordance with the data retention schedule below. Data which cannot be deleted immediately will be held for CIMSPA's legal, regulatory or business purposes which are governed by other legal or regulatory bodies, for example the HMRC.

### Other rights

Individual's rights are qualified (meaning they may not always have these rights, or in all circumstances), but generally speaking, individual's rights include:

- the right of access or to obtain a copy of their information
- the right to rectification
- the right to complain
- the right to restriction of processing
- the right to object to processing
- the right to data portability