



# Retention and Disposal Schedule

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# Retention and Disposal Schedule

## **Adult Social Care**

### AS1 Assessment and Review

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS1.1	Assessment	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Legal
AS1.2	Hearing Impairment	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Templates, SNS cards, Referrals, Policies, Equipment, Leaflets/Info, Processes, meeting notes	Limitation Act 1980	Legal
AS1.3	Visual Impairment	Secure disposal 6 years after date case closed - remove BD8	Delete 6 years after date case closed - remove BD8	Special Category Data	Templates, SNS cards, Referrals, Policies, Equipment, Leaflets/Info, Processes, meeting notes	Limitation Act 1980	Legal
AS1.4	Occupational Therapy	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Gavin Austin Templates, referrals, processes, procedures, leaflets, medical conditions, meeting notes, project work, agency - locums info, Silva Homes information, Equipment, Disabled Facilities Grant, Manual Handling,	Business agreed retention period	Legal
AS1.5	Referral	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Personal	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Legal
AS1.6	Review	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Legal
AS1.7	Support Guidance	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Templates, referrals, processes, procedures, leaflets,	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS1.8	Support Plans	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Care Plan, Risk Assessment, Medical Information, Next of Kin Details, Hospital Assessment	Business agreed retention period	Legal

## AS2 Carers

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS2.2	End of Life Care	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Not Required
AS2.3	Care Provision	Securely dispose 6 years after expiry of contract	Delete 6 years after date contract ended	Special Category Data	LD/ASD Providers ,LD Provider Forums,	Business agreed retention period	Contract
AS2.4	Respite Care	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Not Required
AS2.5	Support for Carers	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS2.6	Young Carers	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data. Client data held in LAS	Business agreed retention period	Not Required

## AS3 DAAT

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS3.1	Client Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
AS3.2	DAAT Admin	Securely manually dispose 3 years after date created	Manually delete 3 years after date created	None		Business agreed retention period	
AS3.3	DAAT Commissioning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
AS3.4	DAAT Health and Safety	Securely manually dispose 3 years after date created	Manually delete 3 years after date created	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS3.5	Staff Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## AS4 Financial Support

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS4.1	Court of Protection – Financial Property and Affairs	Securely dispose 6 years after case closed	Delete 6 years after case closed	Personal	Case files	HMRC - Compliance Handbook Manual CH15400	Legal
AS4.2	Financial Assessments	Securely dispose 6 years plus the current financial year	Delete 7 years after the 5th April	Personal	Data spreadsheets, template letters	HMRC - Compliance Handbook Manual CH15400	Legal
AS4.3	Grants	Securely dispose 6 years plus the current financial year	Delete 7 years after the 5th April	None	Information regarding grants and awards	HMRC - Compliance Handbook Manual CH15400	Not Required
AS4.4	Support Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information sheets, guidance, templates	The National Archives Best Practice	Not Required
AS4.5	Personal Budgets	Securely dispose 6 years plus the current financial year	Delete 7 years after the 5th April	Personal	Financial Services: Payments: All records relating to the administration of payments	HMRC - Compliance Handbook Manual CH15400	Legal



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS4.6	Debt Management	Securely dispose 6 years plus the current financial year	Delete 7 years after the 5th April	Personal	Data spreadsheet	HMRC - Compliance Handbook Manual CH15400	Legal

## AS5 Compliance and Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS5.1	Health	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Management Reports	Business agreed retention period	Not Required
AS5.2	Legislation	Retain until superseded	Retain until superseded	None	Reference copies of key legislation	Business agreed retention period	Not Required
AS5.3	Practice Information	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information sheets, guidance, templates	Business agreed retention period	Not Required
AS5.4	Guidance	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information sheets, guidance, templates	Business agreed retention period	Not Required
AS5.5	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information sheets, guidance, templates	Business agreed retention period	Not Required
AS5.6	Monitoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Management Reports	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS5.7	Change Control	Securely dispose 6 years after completed	Delete 6 years after date completed	None	Change documents	The National Archives Best Practice	Not Required

## AS6 Learning and Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS6.1	Business Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Management Reports	Business agreed retention period	Not Required
AS6.2	Career Pathway	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Professional development plans	Business agreed retention period	Not Required
AS6.3	Conferences	Securely dispose 6 years after date created	Delete 6 years after date created	None	Conference details, booking details, information received, resources	Business agreed retention period	Not Required
AS6.4	Evaluation	Securely dispose 6 years after date created	Delete 6 years after date created	None	Learning and development evaluations	Business agreed retention period	Not Required
AS6.5	Newly Qualified Framework	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Framework and guidance for newly qualified staff	Business agreed retention period	Not Required
AS6.6	Practice Education	Securely dispose 6 years after date placement ended	Delete 6 years after date placement ended	None	Student placements	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS6.7</b>	Reports and Statistics	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Data, Analysis, Reports and Statistics	Business agreed retention period	Not Required
<b>AS6.8</b>	Resources	Retain until superseded	Retain until superseded	None	Training resources	Business agreed retention period	Not Required
<b>AS6.9</b>	Training Courses	Securely dispose 1 year after date superseded	Delete 1 year after date superseded	None	Course details, nominations/applications	Business agreed retention period	Not Required
<b>AS6.10</b>	Workforce Planning and Development	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Plans, strategies, analysis data	Business agreed retention period	Legal

## AS7 Mental Health

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS7.1	Best Interest Decisions	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	Business agreed retention period	Not Required
AS7.2	Court of Protection - Welfare & Deprivation of Liberty	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Client records created by the Deprivation of Liberty Service (DOLS)	Business agreed retention period	Legal
AS7.3	Liberty Protection Safeguards (LPS)	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	Applications, Assessments, Process	Mental Health Act 1983	Legal
AS7.4	Mental Capacity	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	Business agreed retention period	Not Required
AS7.5	Mental Health	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	Mental Health Act Assessments, supporting correspondence, medical recommendations	Mental Health Act 1983	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS7.6	Mental Health Funding	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	Individuals files containing "prime" financial documents	Business agreed retention period	Legal
AS7.7	Guidance	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information sheets, guidance, templates	Business agreed retention period	Not Required
AS7.8	Glenfield Staff Team	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
AS7.9	Bracknell Forest Community Network	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## AS8 Safeguarding

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS8.1	Domestic Abuse	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal	Records relating to adult protection	Business agreed retention period	Legal
AS8.2	Multi Agency Safeguarding Hub (MASH)	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Information and guidance - no client data.	Limitation Act 1980 (Section 2)	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS8.3</b>	Multi-agency public protection arrangements (MAPPA)	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal	Records relating to people with a Multi-Agency Public Protection Arrangements (MAPPA) status	Business agreed retention period	Legal
<b>AS8.4</b>	Multi-Agency Risk Assessment Conference	Securely dispose 6 years after date created	Delete 6 years after date created	Personal	All records relating to Multi Agency Risk Assessment Conference (MARAC)	Limitation Act 1980 (Section 2)	Legal
<b>AS8.5</b>	Practice Information	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information sheets, guidance, templates	Business agreed retention period	Not Required
<b>AS8.6</b>	Protecting Vulnerable Adults	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Safeguarding Vulnerable Adults Coordinator Audits & data	Business agreed retention period	Legal
<b>AS8.7</b>	Quality & Standards	Retain until superseded	Retain until superseded	None	Quality Standards information and guidance	Business agreed retention period	Not Required
<b>AS8.8</b>	Safeguarding Boards	Secure disposal 6 years after date created	Delete 6 years after date created	Personal	Countywide Safeguarding Meeting	Limitation Act 1980 (Section 2)	Legal

## AS9 Support and Care

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS9.1	Advocacy	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.2	Agency provided services	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.3	Blue Badges	Securely dispose 1 year after date of expiry	Delete 1 year after date of expiry	Special Category Data	Applications, Assessments, Process, Finance, Legislation, Templates, Reports, Spread sheets etc, meeting notes, decisions & reviews, communications & website info., blue badge panel, Department for Transport guidance, updates and invoices from Valtech and APS	Business agreed retention period	Legal
AS9.4	Care Homes	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.5	Catering services	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Personal	Quotations, Tenders, Contracts, evidential supporting information	HMRC - Compliance Handbook Manual CH15400	Legal
AS9.6	Community Services	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.7	Day centres	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Leaflets, referral forms, correspondence	The National Archives Best Practice	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS9.8	Equipment	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Information leaflets, specs,	Limitation Act 1980 (Section 2)	Legal
AS9.9	Housing	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Information leaflets, specs,	The National Archives Best Practice	Not Required
AS9.10	Looked After In Care	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.11	Micro Enterprise	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.12	Support Groups	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	The National Archives Best Practice	Not Required
AS9.13	Transport	Securely dispose 7 years after date created	Delete 7 years after date created	Special Category Data	Applications, Refusals, Appeals, Confirmation acceptance records, passenger records	Limitation Act 1980 (Section 2)	Public Task
AS9.14	Volunteers	Securely dispose 1 year after date volunteer resigns	Delete 1 year after date of termination	Special Category Data	Information leaflets, specs,	Business agreed retention period	Contract
AS9.15	Intermediate Care	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	referrals, requests for service, support plan, medication support - upload to electronic social care record, staff records, CQC, Audits, Budget Monitoring, Service Specifications, Projects, Staff Rotas, Sickness Absence,	Business agreed retention period	Legal



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
					Health and Safety, Team Meetings, ICS/Hospital, Recruitment, Marketing Information, Therapy Information, DOM ICS Folder Info, ICS Nursing, Inductions, End of Life, Allocations		

## AS10 Supporting Disabilities

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS10.1</b>	Day Services	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Records relating to clients attending day services	Business agreed retention period	Legal
<b>AS10.2</b>	Employment	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to advice and support on training and employment available to people with disabilities where the person is not known to social services. Occupational Support; files of users of the service	Limitation Act 1980 (Section 2)	Legal
<b>AS10.3</b>	Equipment Advice	Secure disposal 1 year after	Delete 1 year after date last modified	Personal	Short term records of one off enquiries	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
		date last modified					
<b>AS10.4</b>	Independence at Home	Secure disposal 2 years after date last modified	Delete 2 years after date last modified	Personal	Enablement at Home - Client records	Business agreed retention period	Legal
<b>AS10.5</b>	Shared Lives	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Shared Life Hosts	Limitation Act 1980 (Section 2)	Legal
<b>AS10.6</b>	Short Term Care	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Short- term care records for tracking short-tem care, Discharge to Assess records, Social Care records, Intermediate care tracking information	Business agreed retention period	Contract
<b>AS10.7</b>	Transport	Securely dispose 6 years plus the current financial year	Delete 7 years after the 5th April	Personal	All records relating to personal transport budgets	HMRC - Compliance Handbook Manual CH15400	Legal

## AS11 Transition to Adult Care

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS11.1</b>	Area Meetings	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Minutes and meeting notes	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS11.2	Education	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	Business agreed retention period	Not Required
AS11.3	Health	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Information and guidance - no client data.	Business agreed retention period	Not Required
AS11.4	Leaving Care	Archive 2 years after date last modified - retain for date of birth + 75 years	Send to Archives 2 years after date last modified	Special Category Data	Records of young people who are provided with an after-care service under the Children Act This applies to any records kept relating to the after care of young people who were previously looked after either by this or another local authority/agency	The Children (Leaving Care) Act 2000	Legal
AS11.5	Pathway to Employment	Secure disposal 5 years after date last modified	Delete 5 years after date last modified	Personal	Individual Case Files	Business agreed retention period	Legal
AS11.6	Training	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Personal	Staff training records	Business agreed retention period	Contract

## AS12 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS12.1	Compliance Reporting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required
AS12.2	Mental Health	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required
AS12.3	Safeguarding	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required
AS12.4	Disability	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required
AS12.5	Carers	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required
AS12.6	Commissioning	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Statistics, Analysis, Raw Data	Business agreed retention period	Not Required

## AS13 Learning Disabilities and Autism

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS13.1	Support Plans	Secure disposal 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	QAP, Sign off QAP, Approved panel papers, Advanced Care Plans, Person Centred Plans	RETENTION GUIDELINES FOR LOCAL AUTHORITIES 3.18 and Mental Health Act 1983	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS13.2</b>	Approaching Adulthood	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Approaching Adulthood Spreadsheet, Budget Build, Transport,	Limitation Act 1980 (Section 2)	Legal
<b>AS13.3</b>	Autism	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Resources, Budget Build Spreadsheet, Groups, Autism Referrals (external), SAF	Limitation Act 1980 (Section 2)	Legal
<b>AS13.4</b>	Specialist Housing	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Housing Spreadsheet, Special Projects, Voids List, Approaching Adulthood Housing	Limitation Act 1980 (Section 2)	Legal
<b>AS13.5</b>	Minutes	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Safeguarding Minutes, MDT, Best Interest Minutes, Team Meeting, Social Care Meeting Minutes, Health Meeting Minutes, LDMT, LeDeR,	Limitation Act 1980 (Section 2)	Legal
<b>AS13.6</b>	Business Processes	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Allocations, Business Continuity, Monitoring, Auditing, Resources, Internal Checklists Admin. Reports, Funding Streams	Business agreed retention period	Legal
<b>AS13.7</b>	WSTC-Support Workers	Secure disposal 25 years after date last modified	Delete 25 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS13.8	WSTC-Senior Support Worker	Secure disposal 25 years after date last modified	Delete 25 years after date last modified	Personal		Business agreed retention period	
AS13.9	Breakthrough	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	

## AS14 Continuing Health Care

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS14.1	Appeals (all)	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Special Category Data	Decision Letters, Appeal Letters, Progress Spreadsheets,	NHS England	Legal
AS14.2	Applications (all)	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Special Category Data	Checklists, DST, Capacity Assessment, Evidence	NHS England	Legal
AS14.3	Templates/Policies/Guidance	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## AS15 Customer Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS15.1</b>	Compliments and Complaints	Securely dispose 5 years after date resolved	Delete 5 years after date resolved	Personal	Records relating to compliments and complaints received for social services	Retention Guidelines for Local Authorities	Legal

## AS16 Transformation

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS16.1</b>	Transformation	Securely dispose 6 years after date complete	Delete 6 years after date completed	None	Programme/project documentation	Limitation Act 1980 (Section 2)	Not Required

## AS17 Resources

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>AS17.1</b>	Business Support	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Draft documents, team meeting info, team info	The National Archives Best Practice	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS17.2	Electronic Library	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Resources	The National Archives Best Practice	Not Required

## AS18 Adult Community Team

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS18.1	Business Support Team	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	FOI, SAR, Leaflets, Mileage, procedures, recruitment, retention & destruction, Safeguarding, Lockers info, Permits - for BFC street parking, Security of records, data cleaning, safe contents, customer services, ID passes, carers info, panel, SNS, Falls & Positive Steps admin, Transport, Pocket Pal, Emergency contacts, Team Meetings, Templates, Blue Badges, Time Sheets, Cluster meetings,	The National Archives Best Practice	Legal



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS18.2	Adult Community Team	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Referrals, absence sickness/leave, team meetings, time sheets, processes, guidance notes, templates, Clusters, forms, LAS info, Adult Social Care sources, team governance (performance & reports), meeting notes, safeguarding, audits, panel, student placements,	Business agreed retention period	Legal
AS18.3	Adult Community Managers	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Budget Monitoring, staffing - supervisions & appraisals, performance, investigations, disciplinaries, processes & procedures, named managers/supervisor folders, audits, business continuity, plans, FOI & SAR records, recruitment - JD's, person spec., transformation - projects, Terms of Reference	Business agreed retention period	Legal
AS18.4	Intermediate Care	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS18.5	Care Co-Ordinator	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
AS18.6	Bridgewell Archive	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
AS18.7	Staff Personnel	Secure disposal 6 years after member of staff has left the council	Delete 6 years after member of staff has left the council	Special Category Data		Business agreed retention period	

## AS19 Emergency Duty Service

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS19.1	Electronic Library	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS19.2	Operation Delivery	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## AS20 Animal Assisted Therapy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS20.1	Animals	Secure disposal 10 years after date contract terminated	Delete 10 years after date contract terminated	None		Business agreed retention period	
AS20.2	Clients	Secure disposal 6 years after intervention has ended	Delete 6 years after intervention has ended	Personal		Business agreed retention period	
AS20.3	Contracts	Retain until superseded	Retain until superseded	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
AS20.4	Images	Secure disposal 6 years after intervention has ended	Delete 6 years after intervention has ended	None		Business agreed retention period	
AS20.5	Staff Wellbeing	Secure disposal 6 years after intervention has ended	Delete 6 years after intervention has ended	Personal		Business agreed retention period	

# Retention and Disposal Schedule

## **Children and Families**

### CF1 Children Looked After

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF1.1	Meetings	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF1.2	Complaints and Compliments	Retain until draft version is signed off	Retain until draft version is signed off	Personal		Business agreed retention period	
CF1.3	Employee Information	Secure disposal 25 years after date of employee leaving	Delete 25 years after date of employee leaving	Personal		Business agreed retention period	
CF1.4	Events	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF1.5	Inspections	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	
CF1.7	Monitoring and Tracking	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	
CF1.9	Procedures and Processes	Retain until superseded	Retain until superseded	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF1.10</b>	Performance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CF1.11</b>	Resource Information and Training	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF1.12</b>	Templates	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF1.13</b>	Contacts	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## CF2 Central Admin

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF2.1	Absence Return	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
CF2.2	Accommodation	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
CF2.3	Admin Procedures	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
CF2.4	Finance	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
CF2.5	Forms and Templates	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
CF2.6	Health and Safety	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF2.7	Meetings	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF2.8</b>	Personnel	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
<b>CF2.9</b>	Records	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## CF3 Leaving Care

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF3.1	Meetings	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF3.2	Complaints and Compliments	Retain until draft version is signed off	Retain until draft version is signed off	Personal		Business agreed retention period	
CF3.3	Employee Information	Secure disposal 25 years after date of employee leaving	Delete 25 years after date of employee leaving	Personal		Business agreed retention period	
CF3.4	Events	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF3.5	Inspections	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	
CF3.7	Monitoring and Tracking	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF3.9</b>	Procedures and Processes	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF3.10</b>	Performance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CF3.11</b>	Resource Information and Training	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF3.12</b>	Templates	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF3.13</b>	Contacts	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## CF4 Family Placement

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF4.1	Meetings	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF4.2	Complaints and Compliments	Retain until draft version is signed off	Retain until draft version is signed off	Personal		Business agreed retention period	
CF4.3	Employee Information	Secure disposal 25 years after date of employee leaving	Delete 25 years after date of employee leaving	Personal		Business agreed retention period	
CF4.4	Events	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF4.5	Inspections	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	
CF4.7	Monitoring and Tracking	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	
CF4.9	Procedures and Processes	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF4.10	Performance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF4.11	Resource Information and Training	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF4.12	Templates	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF4.13	Contacts	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## CF5 Financial Support

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF5.1</b>	Grants	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	None	Information regarding grants and awards	HMRC - Compliance Handbook Manual CH15400	Not required
<b>CF5.2</b>	Support	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Information regarding financial support available	The National Archives Best Practice	Not required
<b>CF5.3</b>	Guidance	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Guidance, information leaflets	Records Management Code of Practice for Health and Social Care 2016	Not required
<b>CF5.4</b>	Contracts	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF5.5</b>	Returns	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	None		Business agreed retention period	

## CF6 Life Chances Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF6.1	Plans	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	None		Business agreed retention period	
CF6.2	Meetings	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF6.3	Projects	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	
CF6.4	Contacts	Retain until superseded	Retain until superseded	Personal		Business agreed retention period	
CF6.5	Employee Information	Secure disposal 25 years after date of employee leaving	Delete 25 years after date of employee leaving	Personal		Business agreed retention period	

## CF7 Leadership

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF7.1	Assistant Director	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.2	First Response	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.3	Governance	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.4	Inspection	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.5	Life Chances	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.6	Meetings	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.7	PA	Keep permanently	Keep permanently	Personal		Business agreed retention period	
CF7.8	Specialist Support	Keep permanently	Keep permanently	Personal		Business agreed retention period	



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF7.9	Family Safeguarding	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## CF9 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF9.1</b>	Children Looked After	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.2</b>	Central Admin Team	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.3</b>	Early Help	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.4</b>	Family Safeguarding	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.5</b>	Financial Support	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.6</b>	First Response	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF9.7</b>	Fostering Team	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.8</b>	Leadership	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.9</b>	Leaving Care Team	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.10</b>	Life Chances	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.11</b>	Specialist Support	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CF9.12</b>	Youth Justice	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## CF10 Specialist Support

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF10.1</b>	CSST	When finalised transfer to SMART and securely dispose	When finalised transfer to SMART and delete	Special Category Data		Business agreed retention period	
<b>CF10.2</b>	Exploitation	Secure disposal 75 years after date of birth	Delete 75 years after date of birth	Special Category Data		Business agreed retention period	
<b>CF10.3</b>	Larchwood	Secure disposal 15 years after date last modified	Delete 15 years after date last modified	Special Category Data		Business agreed retention period	
<b>CF10.4</b>	Family Group Conference	Secure disposal 75 years after date of birth	Delete 75 years after date of birth	Special Category Data		Business agreed retention period	
<b>CF10.5</b>	Performance and QA	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CF10.6</b>	Draft Court Reports and Chronologies	When finalised transfer to SMART and securely dispose	When finalised transfer to SMART and delete	Special Category Data		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF10.7</b>	Forms and Templates	Secure disposal 15 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
<b>CF10.8</b>	Short Breaks	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Limitation Act 1980 (Section 2)	
<b>CF10.9</b>	Invoicing	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>CF10.10</b>	Access to Records	Secure disposal 5 years after date closed	Delete 5 years after date closed	Special Category Data		Business agreed retention period	
<b>CF10.11</b>	Permanence	Secure disposal 75 years after date last modified	Delete 75 years after date last modified	Special Category Data		Business agreed retention period	

## CF12 Youth Justice

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF12.1</b>	Statutory Case Management	Secure disposal 21 years after date of birth	Delete 21 years after date of birth	Special Category Data		Business agreed retention period	
<b>CF12.2</b>	Pre-Court Case Management	Secure disposal 5 years after date last modified	Delete 5 years after date last modified	Special Category Data		Business agreed retention period	
<b>CF12.3</b>	Administration	Retain for 6 years or until superseded	Retain for 6 years or until superseded	None		Business agreed retention period	
<b>CF12.4</b>	Governance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
<b>CF12.5</b>	People	Secure disposal 7 years after date employee leaves authority	Delete 7 years after date employee leaves authority	Special Category Data		Business agreed retention period	
<b>CF12.6</b>	Restorative Justice	Secure disposal at the end of case by Restorative Justice Co-Ordinator/Youth Justice Admin	Secure disposal at the end of case by Restorative Justice Co-Ordinator/Youth Justice Admin	Special Category Data		Business agreed retention period	
<b>CF12.7</b>	Victims Confidential	Secure disposal 2 years after date last modified	Delete 2 years after date last modified	Special Category Data		Business agreed retention period	
<b>CF12.8</b>	Volunteers Confidential	Secure disposal 25 years after date last modified	Delete 25 years after date last modified	Special Category Data		Business agreed retention period	



## CF13 Early Help

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF13.1	Business Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF13.2	Case Work	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal		Business agreed retention period	
CF13.3	Data and Reporting	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF13.4	Licensing	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF13.5	Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF13.6	Parenting	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF13.7	Quality Assurance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF13.8</b>	Troubled Families	Securely dispose April 2022	Delete April 2022	Personal		Business agreed retention period	
<b>CF13.9</b>	Legal and National Guidance	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CF13.10</b>	Youth Council	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## CF14 Policy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF14.1	Children Looked After	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.2	Central Admin Team	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.3	Early Help	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.4	Family Safeguarding	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.5	Financial Support	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.6	First Response	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF14.7	Fostering Team	Retain until superseded	Retain until superseded	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CF14.8</b>	Leadership	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF14.9</b>	Leaving Care Team	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF14.10</b>	Life Chances	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF14.11</b>	Specialist Support	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CF14.12</b>	Youth Justice	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## CF15 MASH and Assessment

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF15.1	Admin	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	
CF15.2	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF15.3	Research	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None		Business agreed retention period	
CF15.4	Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF15.5	Legal	When finalised transfer to SmartOpen and delete	When finalised transfer to SmartOpen and delete	Special Category Data		Business agreed retention period	
CF15.6	Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF15.7	MASH	Securely dispose 75 years after date created	Delete 75 years after date created	Special Category Data		Business agreed retention period	
CF15.8	Adult Work Tools	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF15.9	Children's Work Tools	Retain until superseded	Retain until superseded	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF15.10	Manager Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CF15.11	First Contact Client Records	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Business agreed retention period	
CF15.12	Quality Assurance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF15.13	Integrated Working	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF15.14	Family Work Tools	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF15.15	Training	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF15.16	Procedures and Processes	Retain until superseded	Retain until superseded	None		Business agreed retention period	
CF15.17	No Names Consultation	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CF15.18	First Contact Legal	When finalised transfer to SmartOpen and delete	When finalised transfer to SmartOpen and delete	Special Category Data		Business agreed retention period	

## CF15 Family Safeguarding

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF16.2	Contacts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
CF16.3	Domestic Abuse	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
CF16.4	Employee Information	Securely dispose 25 years after date of employee leaving	Delete 25 years after date of employee leaving	Personal			
CF16.5	Events	Retain until superseded	Retain until superseded	None			
CF16.6	Family Centre	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
CF16.7	Family Safeguarding Model	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
CF16.8	Inspections	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None			
CF16.9	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None			
CF16.10	Mental Health	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CF16.11	Performance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None			
CF16.12	Procedures and Processes	Retain until superseded	Retain until superseded	None			
CF16.13	Resource Information and Training	Retain until superseded	Retain until superseded	None			
CF16.14	Substance Misuse	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
CF16.15	Templates	Retain until superseded	Retain until superseded	None			

# Retention and Disposal Schedule

## Climate Change



## CC1 Corporate

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CC1.1</b>	CC Action Plans	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CC1.2</b>	CC Policies	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CC1.3</b>	CC Governance	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CC1.4</b>	CC Strategy	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>CC1.5</b>	Council Meetings	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	

## CC2 Operations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CC2.1	Benchmarking and Comparators	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	
CC2.2	Comms and Marketing	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	
CC2.3	Housing/Domestic Energy and Heating	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	
CC2.4	Images	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	
CC2.5	Information and Sources	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	
CC2.6	Webinars and Seminars	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	

# Retention and Disposal Schedule

## **Commissioning**

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## CO1 Tenders and Projects

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CO1.1	Adults	Securely dispose 6 years after date contract expired	Delete 6 years after date contract expired	Personal			
CO1.2	Childrens	Securely dispose 6 years after date contract expired	Delete 6 years after expiry of contract	Personal			
CO1.3	Integration	Securely dispose 6 years after date contract expired	Delete 6 years after expiry of contract	Personal			

## CO2 Contracts

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CO2.1	Adults	Securely dispose 6 years after date contract expired	Delete 6 years after date contract expired	Personal			
CO2.2	Childrens	Securely dispose 6 years after date contract expired	Delete 6 years after date contract expired	Personal			
CO2.3	Integration	Securely dispose 6 years after date contract expired	Delete 6 years after date contract expired	Personal			
CO2.4	Protocols	Securely dispose 6 years after date contract expired	Delete 6 years after date contract expired	Personal			

## CO3 Access to Resources

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CO3.1	Adults	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data			
CO3.2	Childrens	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data			
CO3.3	Direct Payments	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data			

## CO4 Safeguarding

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CO4.1</b>	Adult Safeguarding	When finalised transfer to SMART and delete	When finalised transfer to SMART and delete	Special Category Data			
<b>CO4.2</b>	Children Safeguarding	When finalised transfer to SMART and delete	When finalised transfer to SMART and delete	Special Category Data			
<b>CO4.3</b>	Deputy & Appointeeship	When finalised transfer to SMART and delete	When finalised transfer to SMART and delete	Special Category Data			

## CO5 Financial

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CO5.1</b>	Financial Assessments	Securely dispose 6 years plus the current financial year	Delete 6 years plus the current financial year	Personal			
<b>CO5.2</b>	Finance Direct Payments	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data			
<b>CO5.3</b>	Financial Manager	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal			



## CO6 IASS

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CO6.1	Meeting Notes	Review after 25 years	Review after 25 years	None		Business agreed retention period	
CO6.2	Reports and Budgets	Review after 25 years	Review after 25 years	Personal		Business agreed retention period	
CO6.3	Resources, Fact Sheets and Presentations	Review after 25 years	Review after 25 years	None		Business agreed retention period	
CO6.4	Service User's Personal Information	Review after 25 years	Review after 25 years	Special Category Data		Business agreed retention period	
CO6.5	Evaluations	Review after 25 years	Review after 25 years	Special Category Data		Business agreed retention period	
CO6.6	Team Training and Personal Information	Review after 7 years	Review after 7 years	Personal		Business agreed retention period	
CO6.7	Raising Awareness and Publicity Information	Review after 7 years	Review after 7 years	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CO6.8</b>	Website	Securely dispose 10 years after date superseded	Delete 10 years after date superseded	None		Business agreed retention period	
<b>CO6.9</b>	Child/Young People	Review after 25 years	Review after 25 years	Personal		Business agreed retention period	
<b>CO6.10</b>	Volunteers	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Business agreed retention period	
<b>CO6.11</b>	Miscellaneous and Historic	Review after 25 years	Review after 25 years	Personal		Business agreed retention period	

## CO7 Financial

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CO7.1</b>	Adult Quality Assurance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CO7.2</b>	Children Quality Assurance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CO7.3</b>	LADO (Local Authority Designated Officer)	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Business agreed retention period	

# Retention and Disposal Schedule

## **Communications and Marketing**

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## CM1 Internal Communications

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM1.1</b>	Alert Email System	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM1.2</b>	Forest Views	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM1.3</b>	Projects	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CM1.4</b>	Service Led Communications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	e-newsletters, news articles,	Business agreed retention period	Public Task
<b>CM1.5</b>	Staff Awards	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM1.6</b>	Staff Communications	Keep permanently	Keep permanently	None	e-newsletter, newsletters	Business agreed retention period	Not Required
<b>CM1.7</b>	Strategic Communications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	e-newsletter, newsletters	Business agreed retention period	Not Required

## CM2 Supplier Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CM2.1	Photography	Keep permanently	Keep permanently	Personal	GDPR guidelines, photographs, videos, permission slips	Business agreed retention period	Consent
CM2.2	Publications	Keep permanently	Keep permanently	Personal	External paper,	Business agreed retention period	Public Task
CM2.3	Media Management	Securely dispose 6 years after date last modified	Delete 6 years after last modified	Personal	user guide and supplier correspondence	The National Archives Best Practice	Public Task
CM2.4	E-Newsletters	Securely dispose 6 years after date last modified	Delete 6 years after last modified	Personal		The National Archives Best Practice	Public Task
CM2.5	Digital	Securely dispose 6 years after date last modified	Delete 6 years after last modified	Personal	Digital suppliers correspondence	The National Archives Best Practice	Public Task
CM2.6	Archive	Securely dispose 6 years after date last modified	Delete 6 years after last modified	Personal		The National Archives Best Practice	
CM2.7	Social Media Management	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## CM3 External Communication

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM3.1</b>	Social Media	Keep permanently	Keep permanently	None	Social media blogs Posts articles news	Business agreed retention period	Not Required
<b>CM3.2</b>	Archive	Keep permanently	Keep permanently	None	press releases, statements, FAQ's, comms plans	Business agreed retention period	Not Required
<b>CM3.3</b>	Website	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Publisher guidelines	Business agreed retention period	Not Required
<b>CM3.4</b>	External Publications	Keep permanently	Keep permanently	None	Page plans, drafts, signed off, images	Business agreed retention period	Not Required
<b>CM3.5</b>	Press Office	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	draft statements	The National Archives Best Practice	Public Task
<b>CM3.6</b>	Service Led Comms	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	press releases	The National Archives Best Practice	Not Required
<b>CM3.7</b>	Briefings	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Briefing notes	The National Archives Best Practice	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM3.8</b>	Partnership Comms	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Press releases, statements, FAQ's	The National Archives Best Practice	Not Required
<b>CM3.9</b>	Projects	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM3.10</b>	Videos/Animations	Keep permanently	Keep permanently	None		Business agreed retention period	



## CM4 Graphic Design

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM4.1</b>	Branding	Keep permanently	Keep permanently	None	Corporate guidelines, corporate standards, logos	Business agreed retention period	Not Required
<b>CM4.2</b>	Digital Design	Keep permanently	Keep permanently	None	Staff newsletter, project newsletters, e-newsletters, animation	Business agreed retention period	Not Required
<b>CM4.3</b>	Design for print	Keep permanently	Keep permanently	None	Merchandise, posters, business cards, signage	Business agreed retention period	Not Required
<b>CM4.5</b>	Current Workload	Keep permanently	Keep permanently	None		Business agreed retention period	Not Required

## CM5 Emergency Communications

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM5.1</b>	Emergency Communication Plans	Keep permanently	Keep permanently	Personal	Emergency Communication Plans, Protocols	Business agreed retention period	Public Task
<b>CM5.2</b>	Training	Keep permanently	Keep permanently	Personal		Business agreed retention period	
<b>CM5.3</b>	Sitreps	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## CM6 Image Library

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM6.1</b>	Archive	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.2</b>	CXO	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.3</b>	Delivery	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.4</b>	Generic and Stock	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.5</b>	Internal	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.6</b>	Leisure	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.7</b>	People	Keep permanently	Keep permanently	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CM6.8</b>	Place, Planning and Regeneration	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.9</b>	Places	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.10</b>	Posterity Images (DO NOT USE)	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.11</b>	PPP	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.12</b>	Resources	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.13</b>	Website Resized	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>CM6.14</b>	MS Teams Backgrounds	Keep permanently	Keep permanently	None		Business agreed retention period	

# Retention and Disposal Schedule

## **Community and Libraries**

### CL1 Libraries

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CL1.1	All Libraries	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal		Data Protection Act 2018	Public Task
CL1.2	Summer Reading Challenge	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Booking forms, Register of attendants, Ticket sales, Photograph consent forms	Data Protection Act 2018	Public Task
CL1.3	Activities	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Booking forms, Register of attendants, Ticket sales, Photograph consent forms	Data Protection Act 2018	Public Task
CL1.4	Externally Provided Activities	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Booking forms, Agent details, Tickets	Business agreed retention period	Public Task
CL1.5	Resources	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Templates, Instructions, Guidance, Other resource materials, Quizzes, Word searches	The National Archives Best Practice	Not Required
CL1.6	Library Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	Public Task
CL1.7	Volunteering	Securely dispose 7 years after date last modified	Delete 7 years after last modified	Personal	Expression of interest, Agreements, DBS checks, D of E Student, Work Experience - School contact, Parental consent, References	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CL1.8	Library Photos	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## CL2 Guidance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CL2.1</b>	Guidance	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Leaflets, Processes, Procedures, Guidance	The National Archives Best Practice	Not Required
<b>CL2.2</b>	Manuals	Retain until superseded	Retain until superseded	None	Staff manual	Business agreed retention period	Not Required



## CL3 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CL3.1</b>	Reports	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Reports and evidential information	The National Archives Best Practice	Not Required
<b>CL3.2</b>	Data	Securely dispose 3 years after date last modified	Delete 3 years after last modified	Personal	Open (borrower details) and usage access data	Business agreed retention period	Public Task

## CL4 Community

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CL4.1</b>	Community Centres	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Advice on management of centre, lease agreements Check R and D, minutes of meetings	Business agreed retention period	Not Required
<b>CL4.2</b>	Community Centre Advice	Securely dispose 6 years after date last modified	Delete 6 years after last modified	Personal	Guidance, advice via email and letters, checklists and monitoring reports	The National Archives Best Practice	Public Task
<b>CL4.3</b>	Community Centre Annual General Meetings	Review after 6 years and offer to archives	Review after 6 years and offer to archives	None	Annual General Meeting minutes and annual accounts	Business agreed retention period	Not Required
<b>CL4.4</b>	Community Hubs	Review after 6 years and offer to archives	Review after 6 years and offer to archives	None	Schedules of accommodation, draft plans, guidance and reports - check R and D	Business agreed retention period	Not Required
<b>CL4.5</b>	Volunteering	Securely dispose 7 years after date last modified	Delete 7 years after last modified	Special Category Data	Registers of volunteers, consent forms, contact lists. Check R and D	Business agreed retention period	Consent
<b>CL4.6</b>	Community Events	Securely dispose 7 years after date last modified	Delete 7 years after last modified	Personal	Correspondence, publicity materials, event plans	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CL4.7</b>	Equalities	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	
<b>CL4.8</b>	Armed Forces	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CL4.9</b>	Community Engagement	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>CL4.10</b>	Community Groups	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## CL5 Look Out Discovery Centre

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CL5.1	School and Group Visits	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		HMRC - Compliance Handbook Manual CH15400	
CL5.2	Birthday Parties	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		HMRC - Compliance Handbook Manual CH15400	
CL5.3	Exhibition Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CL5.4	Catering	Securely dispose 6 years after date contract terminated	Delete 6 years after date contract terminated	None		HMRC - Compliance Handbook Manual CH15400	

# Retention and Disposal Schedule

## **Community Safety and Emergencies**

## CS1 Community Safety

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CS1.1	Anti-social Behaviour	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Casework, assessments, care plans, referrals	"Crime & Disorder Act 1998 Data Protection Act 2018 Limitation Act 1980 (Section 2)"	Legal
CS1.2	Domestic Abuse	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Casework, assessments, care plans, referrals	Limitation Act 1980 (Section 2)	Public Task
CS1.3	Modern Slavery and Exploitation	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Casework, assessments, care plans, referrals	Limitation Act 1980 (Section 2)	Public Task
CS1.4	Prevent & Channel	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Minutes, agendas, actions	The National Archives Best Practice	Not Required
CS1.5	Projects	Securely dispose 6 years after last action on project	Delete 6 years after date project closed	None	Project documentation	Limitation Act 1980 (Section 2)	Not Required
CS1.6	CSP	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	Not Required
CS1.7	Media	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## CS2 Governance & Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS2.1</b>	Legislation	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Legislation, procedures, guidance and communication material	The National Archives Best Practice	Not Required
<b>CS2.2</b>	Protocols	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Information sharing protocol, ASB protocol	The National Archives Best Practice	Not Required
<b>CS2.6</b>	Community Safety Team	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	Not Required
<b>CS2.8</b>	Finance	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Finance data/spreadsheets	HMRC - Compliance Handbook Manual CH1540	Not Required
<b>CS2.9</b>	Information Governance	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## CS3 Problem Solving

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS3.1</b>	Partnership Problem-Solving	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, actions	The National Archives Best Practice	Not Required
<b>CS3.2</b>	Town Centre Partnership Problem-Solving	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, actions	The National Archives Best Practice	Not Required
<b>CS3.4</b>	IOM	Securely dispose 7 years after date last date modified	Delete 7 years after date last modified	Special Category Data	Casework, assessments, care plans, referrals	"Crime & Disorder Act 1998 Data Protection Act 2018 Limitation Act 1980 (Section 2)"	Legal



## CS4 Business Continuity

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.1</b>	Corporate Plans	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	For each 3 authorities - Royal Borough, Bracknell & West Berkshire	Civil Contingencies Act	Legal
<b>CS4.2</b>	Adult Care Services	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.3</b>	Children and Families Services	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.4</b>	Communications	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.5</b>	Community and Libraries	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.6</b>	Community Safety and Emergencies	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.7</b>	Crematoria and Cemeteries	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.8</b>	Customer Services	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.9</b>	Democracy	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.10</b>	Economy and Regeneration	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.11</b>	Education	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.12</b>	Environmental Health and Licensing	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.13</b>	Finance	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.14</b>	Forestcare	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.15</b>	Health and Safety	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.16</b>	Housing and Welfare	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.17</b>	Human Resources	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.18</b>	ICT	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.19</b>	Information Management	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.20</b>	Insurance and Risk Management	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.21</b>	Internal Audit	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.22</b>	Leadership	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.23</b>	Legal Services	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.24</b>	Parks and Countryside	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.25</b>	Planning and Building Control	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.26</b>	Procurement	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.27</b>	Property	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.28</b>	Public Health	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.29</b>	Registration Services	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS4.30</b>	Transport	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal
<b>CS4.31</b>	Waste	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Departmental business continuity plans	Civil Contingencies Act	Legal

## CS5 Community Resilience

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS5.1</b>	Business Continuity Promotion	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Meetings, promotional material, training	Civil Contingencies Act	Not Required
<b>CS5.2</b>	Community Plans	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	Community plans, templates, events	Civil Contingencies Act	Legal
<b>CS5.3</b>	Public Advice	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Advice to public	Civil Contingencies Act	Not Required
<b>CS5.4</b>	Public Warnings	Securely dispose 6 years after date created	Delete 6 years after date created	None	Promotional material, programme of events	Civil Contingencies Act	Not Required

## CS6 Emergency Plans

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS6.1</b>	Contacts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Contact lists	The National Archives Best Practice	Public Task
<b>CS6.2</b>	Emergency Response Plans	Keep permanently	Keep permanently	None	Plans	Civil Contingencies Act	Not Required
<b>CS6.3</b>	Events	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Event plans. Site - meeting, plans, work in progress, site specific info	The National Archives Best Practice	Public Task
<b>CS6.4</b>	Out of Hours	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Out of hours manual, out of hours rotas	The National Archives Best Practice	Public Task



## CS7 Incidents Response

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS7.1</b>	Major Incidents	Keep permanently	Keep permanently	Special Category Data	Logs, budgets, communication, W&I, action plan, pictures, recovery, web pages	Civil Contingencies Act	Legal
<b>CS7.2</b>	Minor Incidents	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Debrief reports, Analysis data	Civil Contingencies Act	Legal
<b>CS7.3</b>	Archived Incidents	Keep permanently	Keep permanently	Special Category Data	Logs, budgets, communication, W&I, action plan, pictures, recovery, web pages	Civil Contingencies Act	Legal

## CS8 Multi Agency Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CS8.1	Agencies	Keep permanently	Keep permanently	None	Meetings, work in progress, group specific, action plans	Business agreed retention period	Not Required
CS8.2	Agreements	Securely dispose 6 years after agreement expires/terminated	Delete 6 years after date agreement ended	Special Category Data	Agreements - mutual aid	Business agreed retention period	Legal
CS8.3	Resilience Groups	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Meetings, work in progress, group specific, action plans	The National Archives Best Practice	Not Required

## CS9 Training and Exercising

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CS9.1</b>	Competence	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Database of trained staff	The National Archives Best Practice	Not Required
<b>CS9.2</b>	Courses	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Course - presentations, course admin. Templates - flyer, pre course info, post course info, feedback form, certificate	The National Archives Best Practice	Not Required
<b>CS9.3</b>	Programme	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Annual training programme, annual exercise programme	The National Archives Best Practice	Not Required

# Retention and Disposal Schedule

## **Crematoria and Cemeteries**

## CR1 Crematory

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR1.1	Maintenance	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Crematory for maintenance, Services Scheduled reports	Business agreed retention period	Not Required
CR1.2	Reports	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Statistics, FT Reports, Risk assessments	Business agreed retention period	Not Required

## CR2 Mapping

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR2.1	Cemetery Mapping	Keep permanently	Keep permanently	None	Grave sections	Local Government Act 1972. Local Authorities Cemeteries Order 1977.	Not Required
CR2.2	Memorial Mapping	Keep permanently	Keep permanently	None	Leather panels, Rose trees, Copse stone, Memorial vase, Sanctions, Ailsa Craige, Test digs.	Local Government Act 1972. Local Authorities Cemeteries Order 1977.	Not Required
CR2.3	Photos	Keep permanently	Keep permanently	None	Keep permanently	Business agreed retention period	Not Required
CR2.4	Grounds & Building	Keep permanently	Keep permanently	None		Business agreed retention period	

## CR3 Operations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR3.1	Applications	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal	Burial applications form to be retained permanently either scanned or hardcopy	Local Government Act 1972. Local Authorities Cemeteries Order 1977. The Cremation (England and Wales) Regulations 2008 (Section 34)	Legal
CR3.2	Brochures	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Brochures	The National Archives Best Practice	Not Required
CR3.3	Communications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Contacts, Funeral Directors, Suppliers	The National Archives Best Practice	Not Required
CR3.4	Forms	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal	Medical certificates	The Cremation (England and Wales) Regulations 2008 (Section 34)	Legal
CR3.5	Licenses	Securely dispose 6 years after date license ended	Delete 6 years after date license ended	None	Environmental Health Licence to Operate	Business agreed retention period	Not Required
CR3.6	Fees	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CR3.7	Partnerships	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
CR3.8	Procedures	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CR3.9</b>	Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>CR3.10</b>	Finance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	



## CR4 Memorials Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR4.1	Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Stock take, Audit for each memorial	Limitation Act 1980 (Section 2)	Not Required
CR4.2	Memorial Masons	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Details of memorial masons- contacts, supplier information	The National Archives Best Practice	Not Required
CR4.3	Memorials	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Word grid, Terms & Conditions	The National Archives Best Practice	Not Required

## CR5 Statutory & Regulations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CR5.1</b>	Cem & Crem Regulations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Burial Acts, Cremation Act, Health & Safety, LACO	The National Archives Best Practice	Not Required
<b>CR5.2</b>	Cemetery/Crematory Managers Liaison Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, Agendas	Business agreed retention period	Not Required
<b>CR5.4</b>	Public Health Funeral	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Regulations, guidance	The National Archives Best Practice	Not Required

## CR6 Managing Risk

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CR6.1</b>	Risk Assessment	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Grounds, Building	Health & Safety regulations. Retention Guidelines for Local Authorities para 9.7	Not Required
<b>CR6.2</b>	Risk Reports	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Risk reports	Business agreed retention period	Not Required

## CR7 Closed Churchyards

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CR7.1</b>	Ascot Priory Road	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None	Memorial testing, trees, walls and grass cutting	The National Archives Best Practice	Not Required
<b>CR7.2</b>	St Michael's Church, Easthampstead	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None	Memorial testing, trees, walls and grass cutting	The National Archives Best Practice	Not Required

## CR8 Buildings

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR8.1	Planned Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Maintenance Schedule, Dig Orders, Grave Maintenance	Limitation Act 1980 (Section 2)	Not Required
CR8.2	Response Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Pest Control	Limitation Act 1980 (Section 2)	Not Required
CR8.3	Assets & Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CR8.4	Chapels	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CR8.5	Contractors/Suppliers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
CR8.6	Regs & Reports	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	

## CR9 Grounds Maintenance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
CR9.1	Botanicals	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Orders, Bedding, Baskets	The National Archives Best Practice	Not Required
CR9.2	Machinery	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Maintenance schedules, Orders, Agreements	The National Archives Best Practice	Not Required

## CR10 Cemetery

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CR10.1</b>	Graves	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	
<b>CR10.2</b>	Stats/Reports	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	

# Retention and Disposal Schedule

## **Customer Services**

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### CU1 Operational Guidance

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CU1.1</b>	Contact Centre	Securely dispose 3 years after superseded	Delete 3 years after superseded	None	Guidance, FAQs, Operational Info, Policies and Procedures	Business agreed retention period	Not Required
<b>CU1.2</b>	Customer Services Support	Securely dispose 3 years after superseded	Delete 3 years after superseded	None	Guidance, FAQs, Operational Info, Policies and Procedures	Business agreed retention period	Not Required
<b>CU1.3</b>	Reception	Securely dispose 3 years after superseded	Delete 3 years after superseded	None	Guidance, FAQs, Operational Info, Policies and Procedures	Business agreed retention period	Not Required

## CU2 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CU2.1</b>	Contact Stats	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Analytics, KPI Stats	The National Archives Best Practice	Not Required
<b>CU2.3</b>	Performance Data	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Analytics, KPI Stats	The National Archives Best Practice	Not Required

## CU3 E-Citizen

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>CU3.1</b>	Documentation	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	

# Retention and Disposal Schedule

## Democracy

## DM1 Appeals

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM1.1</b>	Exclusion Appeals	Securely dispose 7 years after last modified	Delete 7 years after last modified	Special Category Data	Agendas and minutes plus associated correspondence with parties to the appeals.	Exclusion from maintained schools, academies and pupil referral units in England Statutory Guidance (September 2017)	Legal
<b>DM1.2</b>	Licensing Appeals	Securely dispose 7 years after last modified	Delete 7 years after last modified	Special Category Data	Agendas and minutes plus associated correspondence with parties to the appeals.	Licensing Act 2003	Legal
<b>DM1.3</b>	School Appeals	Securely dispose 3 years after last modified	Delete 3 years after last modified	Special Category Data	Agendas and minutes plus associated correspondence with parties to the appeals.	School Admissions Appeals Code 2014	Legal
<b>DM1.4</b>	School Transport Appeals	Securely dispose 7 years after last modified	Delete 7 years after last modified	Special Category Data	Agendas and minutes plus associated correspondence with parties to the appeals.	Business agreed retention period	Legal

## DM2 Civic

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
DM2.1	Car	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Invoice recording, invoices, contract info	Business agreed retention period	Not Required
DM2.2	Charity	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Budget spreadsheet, event logistics, invitation lists, attendance list	The National Archives Best Practice	Public task
DM2.3	Digital	Securely dispose 2 years after date created	Delete 2 years after date created	None	Facebook login/user details, Twitter log in/user details, photos from events	General Data Protection Regulations 2018	Consent
DM2.4	Engagements	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Invitations, attendees, invitation lists, attendance list, budget spreadsheets, contacts, food/catering, seating plan	The National Archives Best Practice	Public task
DM2.5	Events	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Invitations, attendees, invitation lists, attendance list, budget spreadsheets, contacts, food/catering, seating plan	Business agreed retention period	Public task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM2.6</b>	Freedom of Borough	Dispose of personal data but all official records keep permanently. Offer to Archives	Dispose of personal data but all official records keep permanently. Offer to Archives	None	Nominations, decisions, invitations, correspondence	Business agreed retention period	Public task
<b>DM2.7</b>	Induction	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Induction records	The National Archives Best Practice	Not Required
<b>DM2.8</b>	Regalia	Securely dispose 6 years after last modified. Keep design and historical background information permanently. Offer to Archives	Securely dispose 6 years after last modified. Keep design and historical background information permanently. Offer to Archives	None	Insurance info, invoices, design info	Business agreed retention period	Not Required
<b>DM2.9</b>	London and Forth	Keep permanently	Keep permanently	Personal		Business agreed retention period	
<b>DM2.10</b>	Contact List	Securely dispose 6 years after last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>DM2.11</b>	Comms Plan	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM2.12</b>	Correspondence	Securely dispose 7 years after last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
<b>DM2.13</b>	Flag Protocol	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>DM2.14</b>	General Information	Securely dispose 7 years after last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>DM2.15</b>	Procedures	Securely dispose 7 years after last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>DM2.16</b>	Info from NACO Website	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>DM2.17</b>	Timeline of Events for 2019	Securely dispose 2 years after last modified	Delete 2 years after date last modified	None		Business agreed retention period	
<b>DM2.18</b>	Queens Award Nomination	Securely dispose 2 years after last modified	Delete 2 years after date last modified	None		Business agreed retention period	



## DM3 Operations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
DM3.1	Data Sharing Agreements	Keep permanently	Keep permanently	None		Business agreed retention period	
DM3.2	Democracy Snapshot	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	
DM3.3	Freedom of Information	Keep permanently	Keep permanently	None		Business agreed retention period	
DM3.4	General	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	
DM3.5	Licences	Keep permanently	Keep permanently	None		Business agreed retention period	
DM3.6	Modern.gov	Keep permanently	Keep permanently	None		Business agreed retention period	
DM3.7	Meeting Room Information	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		Business agreed retention period	
DM3.8	Meetings List	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	
DM3.9	Press Routine Comms	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		Business agreed retention period	
DM3.10	Tender Openings	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	
DM3.11	Ward Alerts	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM3.12</b>	Business and Service Matters	Securely dispose 3 years after last modified	Delete 3 years after date last modified	None		Business agreed retention period	

## DM4 Decision Making

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM4.1</b>	Council & Non-executive	Keep permanently	Keep permanently	Personal	Agendas and minutes plus associated correspondence relating to the meetings.	Local Government Acts 1972 and 2000	Legal
<b>DM4.2</b>	Executive	Keep permanently	Keep permanently	Personal	Agendas and minutes plus associated correspondence relating to the meetings.	Local Government Act 1972 s100b Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000	Legal
<b>DM4.3</b>	Executive Advisory Panel	Keep permanently	Keep permanently	None	Agendas and minutes plus associated correspondence relating to the meetings.	Local Government Act 1972 s100b Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000	Not Required
<b>DM4.4</b>	Independent Remuneration Panel	Securely dispose 6 years after last modified	Delete 6 years after last modified.	Personal	Agendas and minutes plus associated correspondence relating to the meetings.	Local Government Act 1972 s100b Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM4.5</b>	Individual Decisions	Securely dispose 6 years after last modified	Delete 6 years after last modified	Personal	Reports and decision records.	Local Government Act 1972 s100b Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000	Legal
<b>DM4.6</b>	Overview & Scrutiny	Securely dispose 6 years after last modified	Delete 6 years after last modified	Personal	Minutes drafts, agendas, reports (annual), presentations, reference material, policies, email (copies), task & finish background, panels	Local Government Act 1972 s100b Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000	Legal

## DM5 Election & Referendum

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM5.1</b>	Borough	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal
<b>DM5.2</b>	Parish	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal
<b>DM5.3</b>	Parliamentary	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal
<b>DM5.4</b>	Police & Crime Commissioner	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal
<b>DM5.5</b>	Referendums	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal
<b>DM5.6</b>	Returning Officer	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Schedule polling structure, staff lists, payment schedules, count documentation, risk register, project plan	Business agreed retention period	Legal

## DM6 Electoral Registration

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM6.1</b>	Annual Canvas	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Canvas Returns	Business agreed retention period	Legal
<b>DM6.2</b>	Electoral Registers	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Marked registers, schedule of register distribution, payments	Business agreed retention period	Legal
<b>DM6.3</b>	Registration	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Electoral Register	Business agreed retention period	Not Required

## DM7 Electoral Reviews

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM7.1</b>	Boundary Reviews	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Boundary Commission Reports	Business agreed retention period	Not Required
<b>DM7.2</b>	Community Governance Review	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Governance Review Petitions, Reports, Correspondence	Business agreed retention period	Not Required
<b>DM7.3</b>	Reviews	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Other Reviews & Correspondence	Business agreed retention period	Not Required
<b>DM7.4</b>	Polling District and Polling Places Reviews	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Reviews and correspondence	Business agreed retention period	Not Required

## DM8 Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM8.1</b>	Annual Canvas	Securely dispose 1 year after date last modified	Delete 1 year after date last modified	None	Canvas Returns	The National Archives Best Practice	Not Required
<b>DM8.2</b>	Community	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information sheets, newsletters, surveys, consultations, events, correspondence	The National Archives Best Practice	Not Required
<b>DM8.3</b>	Electoral Commission	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports & Correspondence	The National Archives Best Practice	Not Required
<b>DM8.4</b>	Local Democracy Week	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information sheets, newsletters, surveys, consultations, events, correspondence	The National Archives Best Practice	Not Required
<b>DM8.5</b>	National Democracy Week	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information sheets, newsletters, surveys, consultations, events, correspondence	The National Archives Best Practice	Not Required
<b>DM8.6</b>	UK Parliament Week	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information sheets, newsletters, surveys, consultations, events, correspondence	The National Archives Best Practice	Not Required



## DM9 Governance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM9.1</b>	Constitution	Keep permanently	Keep permanently	None	PDF of final versions, revisions, emails, tracking changes, log of changes	Local Government Act 2000	Not Required
<b>DM9.2</b>	Delegations	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Logs of Leaders delegations	Local Government Act 2000 (Constitutions)(England) Direction 2000	Not Required
<b>DM9.3</b>	Hospitality	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Hospitality forms, email confirmations	Limitation Act 1980 (Section 2)	Not Required
<b>DM9.4</b>	Register of Interests	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Interest forms, recording docs, email confirmation of changes	Local Government Act 1972 Section 94 (1) / Corporate = Limitation Act 1980 (Section 2)	Legal
<b>DM9.5</b>	Councillor Complaints	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Retention Guidelines for Local Authorities	
<b>DM9.6</b>	Approvals and Delegations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM9.7</b>	Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>DM9.8</b>	Service Complaints	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## DM10 Member Services

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM10.1</b>	Allowances	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Expenses reconciliation, claim forms, info to payroll for allowance payments, public notice info	Local Government Act 1972 Section 94 (1)	Legal
<b>DM10.2</b>	Development	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Info about individual events, signed forms to enable attendance, planning schedule, logistics	The National Archives Best Practice	Public task
<b>DM10.3</b>	Champions	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	List of Members	The National Archives Best Practice	Not Required
<b>DM10.4</b>	Committee Membership	Offer to archives 6 years after date last modified	Offer to archives 6 years after date last modified	None	Registers of Committees, Attendees & Boards	Local Government Act 2000 (Section 15)	Not Required
<b>DM10.5</b>	Contacts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Contact lists	Local Government Act 1972 Section 94 (1)	Legal
<b>DM10.6</b>	Elections	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Handbook for new starters	Business agreed retention period	Public task
<b>DM10.7</b>	Logistics Support to Members	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Parking, ICT, passes	The National Archives Best Practice	None

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>DM10.8</b>	Political Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Letters, presentations, political information, PDF from outside bodies, leaders personal information, CVs, passwords, payment details	The National Archives Best Practice	Public task
<b>DM10.9</b>	Representation	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Membership lists, age, co-opted members	Business agreed retention period	Public task
<b>DM10.10</b>	The Leaders Office	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## DM11 Policy & Guidance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
DM11.1	Civic Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Policies and guidance	Business agreed retention period	None
DM11.2	Electoral Policy & Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Policies and guidance	Business agreed retention period	Not Required
DM11.3	Governance Policy & Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Policies and guidance	Business agreed retention period	Not Required
DM11.4	Democracy Guidance	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None		Business agreed retention period	

# Retention and Disposal Schedule

## **Economy and Regeneration**

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## ER1 Business Intelligence

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ER1.1	Business Liaison	Offer to the archives 6 years after date last modified	Send to archives 6 years after date last modified	Personal	Templates, minutes, statistics, reports, correspondence	Business agreed retention period	Public Task
ER1.2	Business Reports and Statistics	Offer to the archives 6 years after date last modified	Send to archives 6 years after date last modified	None	Reports, articles, statistics	Business agreed retention period	Not Required
ER1.3	Annual Reports	Offer to the archives 6 years after date last modified	Send to archives 6 years after date last modified	None	Reports, appendices	Business agreed retention period	Not Required
ER1.4	Enquiries	Offer to the archives 6 years after date last modified	Send to archives 6 years after date last modified	Personal	Enquiries, responses, statistics	Business agreed retention period	Public Task
ER1.5	Surveys	Keep permanently	Keep permanently	None		Business agreed retention period	Not required

## ER2 Promotions

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ER2.1	Film and TV	Securely dispose 2 years after date last date modified	Delete 2 years after date last modified	None	Correspondence	Business agreed retention period	Not Required
ER2.2	Promotion and Marketing	Securely dispose 7 years after date last date modified	Delete 7 years after date last modified	None	Brochures, photographs, web articles, statistics	Business agreed retention period	Not Required
ER2.3	Events	Securely dispose 7 years after date last date modified	Delete 7 years after date last modified	Personal	Contact Lists, invites, RSVPs	Business agreed retention period	Public Task
ER2.3	Business Photography	Keep permanently	Keep permanently	None	Photographs	Business agreed retention period	Not Required



## ER3 Partnerships

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ER3.1	Partner	Offer to archives 4 years after date last date modified	Offer to archives 4 years after date last modified	Personal	Minutes and agendas, terms of reference, background papers, decisions	Local Government Acts 1972 and 2000	Legal

## ER4 Strategy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ER4.1</b>	Town Centre Vision	Offer to archives 15 years after date last modified	Offer to archives 15 years after date last modified	None	Vision Records, Strategic plans	Business agreed retention period	Not Required
<b>ER4.2</b>	Economic Strategy	Offer to archives 15 years after date last modified	Offer to archives 15 years after date last modified	None	Vision documents, Strategic plans	Business agreed retention period	Not Required

## ER5 Regeneration

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ER5.1	Bracknell Town Centre	Offer to archives 15 years after date last modified	Offer to archives 15 years after date last modified	None	Committee reports, enquiries	Business agreed retention period	Not Required
ER5.2	Town Centre Management	Offer to archives 15 years after date last modified	Offer to archives 15 years after date last modified	None	Public realm management, safety, management strategy	Business agreed retention period	Not Required
ER5.3	Commercialisation	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Legal Records, contracts	The National Archives Best Practice	Not Required
ER5.4	Legal Agreements	Securely dispose 12 years after contract expiry	Delete 12 years after date contract expires	Personal	CPO development agreement, other legal agreements, valuations, development agreements, variation notices	Limitation Act 1980	Legal
ER5.5	CPO Notices	Securely dispose 12 years after date notice served	Delete 12 years after date last modified	Personal	Notices and settlements	Planning and Compulsory Purchase Acts	Legal
ER5.6	Valuations	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	None	Valuations, supporting Records	Business agreed retention period	Not Required
ER5.7	Partnership Working	Offer to archives 4 years after last date modified	Offer to archives 4 years after last modified	None	Meetings, minutes, agendas	Local Government Acts 1972 and 2000	Not Required

# Retention and Disposal Schedule

## Education and Learning

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## ED1 Access and Inclusion

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED1.1	Traveller Sites	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal	All records relating to the provision of teaching support for traveller children	Limitation Act 1980 (Section 2)	Legal
ED1.2	Fair Access	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Special Category Data	Application and correspondence, chronology and analytics	School Admission Appeals Code 2011	Legal
ED1.3	Inclusion Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Chronologies, meeting minutes, action plans and professional reports, Data Analytics	The National Archives Best Practice	Public Task
ED1.4	Alternative Provision	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Personal	Provider information, contracts, data analytics	HMRC - Compliance Handbook Manual CH15400	Legal
ED1.5	Special Educational Needs	Securely dispose 33 years after date of birth	Delete 33 years after date of birth	Special Category Data	Educational, Health & Care Plan, Appendices	Education (Pupil Information) (England) Regulations 2000. S 408 & 563 The School Standards & Framework Act 1998	Legal

## ED2 Admissions and Exclusions

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED2.1	Appeals	Securely dispose 5 years after appeal resolved	Delete 5 years after date resolved	Personal	Appeal agendas, appeal maps, master templates, extra information from schools, appeal cases primary, appeal cases secondary, appeal received data, appeals SEN information, guidance, NET capacity for schools, service family guidance, Appeals form, parental preference form, correspondence	School Admissions Appeals Code 2012	Legal
ED2.2	Secondary Applications	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	applications, birth certificates, court orders, social and medical applications, proof of address, SIF, correspondence, acceptance and refusals, waiting lists	School Admissions Code 2012	Legal
ED2.3	Primary Applications	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	applications, birth certificates, court orders, social and medical applications, proof of address, SIF, correspondence, acceptance and refusals, waiting lists	School Admissions Code 2012	Legal
ED2.4	In Year Applications	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	applications, birth certificates, court orders, social and medical applications, proof of address, SIF, correspondence, waiting lists	School Admissions Code 2012	Legal
ED2.5	Junior Applications	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	applications, birth certificates, court orders, social and medical applications, proof of address, SIF, correspondence, acceptance and refusals, waiting lists	School Admissions Code 2012	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED2.6	Exclusions	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	None	Not School Admissions	Limitation Act 1980 (Section 2)	Legal
ED2.7	Number on Roll	Keep permanently	Keep permanently	Personal	Individual school class list, correspondence, School Admission board	D of E Requirement	Legal
ED2.8	Allocations	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Individual school allocation lists, allocation breakdown	Business agreed retention period	Public Task
ED2.9	Admission Arrangements	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Annual admission arrangements for all BF schools and SLA schools (including non BF schools)	School Admissions Code 2012	Legal
ED2.10	Name Changes	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal	Deed poll, birth certificates, court orders, correspondence	Limitation Act 1980 (Section 8)	Public Task
ED2.11	Term Dates	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None	Setting of term dates for Bracknell Forest community schools	Business agreed retention period	Not Required
ED2.12	Adult Enrolment	Education and Skills Funding Agency 7 years, European Social Fund 2030	Review 7 years after date last modified	Special Category Data	Enrolment forms, signed learner agreements, group profiles, signed certificates, registers (Education and Skills Funding Agency), Enrolment forms, signed learner agreements, group profiles, signed certificates, registers(European Social Fund)	School Admissions Code 2012, Education and Skills Funding Agency	Legal
ED2.13	Delayed Entry	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED2.14	Admissions Data Files	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal		Business agreed retention period	



## ED3 Advice and Guidance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED3.1</b>	Advice to Schools	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Consultation forms, visit records, email correspondence, notes and progress (schools and pupils). Consultation file of need, provisions /recommendations, email advice,	Business agreed retention period	Public Task
<b>ED3.2</b>	Parental Advice	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	Special Category Data	Email correspondence. Annual Guides - Guide to Secondary Education, Guide to Primary Education, Guide to In-Year applications. Consultation file of need, provisions /recommendations, email advice,	Business agreed retention period	Public Task
<b>ED3.3</b>	Adults Education Advice	Securely dispose 1 year after date last modified	Delete 1 year after date last modified	Personal	Correspondence to and from students	Business agreed retention period	Public Task
<b>ED3.4</b>	Publicity	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	brochure and leaflet proofs,	Business agreed retention period	Not Required
<b>ED3.5</b>	Guidance	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Guidance, handbooks - not personal.	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED3.6</b>	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Policies and procedures - not personal.	Business agreed retention period	Not Required
<b>ED3.7</b>	Family Information Service	Securely dispose 6 years after date superseded	Delete 6 years after date last modified	Personal		Business agreed retention period	

## ED4 Arts and Sport

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED4.1	Field Centres	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	All records relating to the administration of bookings for the outdoor centres	HMRC - Compliance Handbook Manual CH15400	Legal
ED4.2	Music Services	Securely dispose 6 years after end of service	Delete 6 years after date service ended	Personal	All records relating to the provision of instrumental tuition in schools	Limitation Act 1980 (Section 2)	Contract
ED4.3	Performing Arts	Securely dispose 6 years after end of service	Delete 6 years after date service ended	Personal	All records relating to the provision of performing arts tuition in schools	Limitation Act 1980 (Section 2)	Contract
ED4.4	Offsite Adventurous Activities	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Personal	Contracts for courses for out of school activities. Approvals, contract with OVA, manual of guidance, records of visits, incidents, insurance, newsletter,	HMRC - Compliance Handbook Manual CH15400	Legal
ED4.5	Young People in Sport	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## ED5 Curriculum Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED5.1</b>	International Projects	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	Personal	All records relating to the management of International Projects	Limitation Act 1980 (Section 8)	Contract
<b>ED5.2</b>	National Curriculum	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Personal learning programmes, recommendations to meet curriculum targets. • SACRE, • English • Maths, • Foundation Subjects, • PE • Whole School Curric. Devel, • Oracy, • Literacy Across Curric, • Numeracy Across Curric, • Personal Devel.	Business agreed retention period	Public Task
<b>ED5.3</b>	Out of Schools Projects	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to the provision of school clubs and activities	Limitation Act 1980 (Section 2)	Public Task
<b>ED5.4</b>	Outdoor Education	Securely dispose 14 years after date last modified	Delete 14 years after date last modified	Personal	All records relating to the administration of outdoor activity centres by local authorities	3 part supplement to the Health & Safety of Pupils on Educational Visits (HASPEV) (1998).	Legal
<b>ED5.5</b>	Schools Curriculum	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	Personal learning programmes, recommendations to meet curriculum targets.	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED5.6</b>	Adult Learning	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Learner voice evaluation analysis	Business agreed retention period	Public Task
<b>ED5.7</b>	Alternative Curriculum	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Special Category Data	transition support work	Business agreed retention period	Public Task

## ED7 Employment Skills

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED7.1	Careers Advice	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Referrals, reports	Limitation Act 1980 (Section 2)	Public Task
ED7.2	Workplace Training	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Referrals, reports	Limitation Act 1980 (Section 2)	Public Task
ED7.3	Service Development	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	All records relating to the development and implementation of the employment skills development plan	Business agreed retention period	Not Required
ED7.4	Recruitment and Induction	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information/advice on recruitment and induction	The National Archives Best Practice	Not Required

## ED8 Life Long Learning

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED8.1	Community Learning	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Course information sheets, tutor handbooks, learner handbooks	Business agreed retention period	Not Required
ED8.2	Basic Skills Development	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	All records relating to basic skills development	The National Archives Best Practice	Not Required
ED8.3	Colleges	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Records relating to enrolment, observations, payments	The National Archives Best Practice	Legal
ED8.4	Academies	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	Personal	Records relating to enrolment, observations, payments	HMRC - Compliance Handbook Manual CH15400	Legal
ED8.5	Open Learning Centre	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Special Category Data	Bookings diary - Open Learning Centre, Course bookings - Community Learning, facilities contracts,	HMRC - Compliance Handbook Manual CH15400	Legal
ED8.6	Leadership Hub	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Records relating to the Leadership Hub	The National Archives Best Practice	Not Required
ED8.7	Staffing	Securely dispose 25 years after date employment terminated	Delete 25 years after date employment terminated	Personal	Tutor contact details, staff contact details, 1:1 records,	Business agreed retention period	Contract

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED8.8	Resources	Retain until superseded	Retain until superseded	None	EPS Professional resources	Business agreed retention period	Not Required
ED8.9	Adult Learners	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Enrolment forms, group profiles, signed certificates, registers, course admin spreadsheet, Photographs, signed photo release forms, external verifier logs	Business agreed retention period	Public Task
ED8.10	Community Learning Managers	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None		Business agreed retention period	
ED8.11	Open Learning Centre Managers	Securely dispose 6 years after date contract terminated	Delete 6 years after date contract terminated	Special Category Data		Business agreed retention period	
ED8.12	Staffing - CCE Managers	Securely dispose 25 years after date employment terminated	Delete 25 years after date employment terminated	Personal		Business agreed retention period	



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED8.13	Staffing - CL Managers	Securely dispose 25 years after date employment terminated	Delete 25 years after date employment terminated	Personal		Business agreed retention period	
ED8.14	Staffing - OLC Managers	Securely dispose 25 years after date employment terminated	Delete 25 years after date employment terminated	Personal		Business agreed retention period	

## ED9 Management of Schools

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED9.1	Admin	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	All records relating to the administration of school places	School Admissions Code 2012	Legal
ED9.2	Emergency Contacts	Securely dispose 1 year after date superseded	Delete 1 year after date superseded	Personal	Emergency Planning Contacts, Key holders details	Business agreed retention period	Consult
ED9.3	Governing Bodies	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Minutes, chairs, clerks, GB monitoring, reference group, Induction, Instrument of Government, governor roles, LEA governor appointments, NLGs, Pan Berkshire Governor Services, Review of Governance, Self-evaluation, Strategy, Website	Business agreed retention period	Public Task
ED9.4	Governor Contacts	Retain until superseded	Retain until superseded	Personal	Change forms, GB details reports	Business agreed retention period	Consult
ED9.5	Health and Nursing	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to the provision of the school nursing service	Limitation Act 1980 (Section 2)	Legal
ED9.6	Environmental Management	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED9.7	Performance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	All records relating to the development and implementation of school performance and assessment reports	Business agreed retention period	Not Required
ED9.8	Plans	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Site maps, floor plans	Business agreed retention period	Not Required
ED9.9	Guidance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.10	Free School Meals	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	FSM application, outcome, letter templates to schools	HMRC - Compliance Handbook Manual CH15400	Legal
ED9.11	School Crossing Patrol	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Contracts, application forms, risk assessment, correspondence	Business agreed retention period	Public Task
ED9.12	Commissioning Of Education Providers	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Personal	Provider details, Contracts for individual students,	HMRC - Compliance Handbook Manual CH15400	Legal
ED9.13	Asset Management	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.14	DFE	Keep permanently	Keep permanently	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED9.15	School Contracts	Securely dispose 6 years after contract end	Delete 6 years after date contract terminated	Personal	Quotations, Tenders, Contracts, evidential supporting information	HMRC - Compliance Handbook Manual CH15400	Legal
ED9.16	School Organisation	Securely dispose 25 years after date school closed	Delete 25 years after date school closed	Personal	Academies, new schools, changes to existing schools, designated areas, planning areas, meetings (School Sufficiency Board)	Education Act 1996 Sections 7, 437-443	Public Task
ED9.17	Planning for School Places (by academic year)	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Forecasts (mainstream, SEN, Post 16), School Places Plan, School Capacity Strategy, housing, SCAP Return, Scorecard	Business agreed retention period	Not Required
ED9.18	Capital programme (by financial year)	Securely dispose 6 years after end of programme	Delete 6 years after date programme ended	Personal	DfE, Reports, PADs, Programme, S106, Devolved Formula Capital	Business agreed retention period	Legal
ED9.19	Capital Projects (by project by school)	Securely dispose 12 years after end of project	Delete 12 years after date project ended	Personal	Brief, finance, design, meetings, correspondence, compliance (H&S, planning, building control, CDM, asbestos), photos, performance, procurement, legal, programme	Business agreed retention period	Legal
ED9.20	Health & Safety (by school)	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Asbestos register, Legionella, Fire safety, risk management	Health & Safety Act 1974	Legal
ED9.21	Emergency Planning (by school)	Retain until superseded, Archive 7 years after superseded	Archive 7 years after date superseded	Special Category Data	School Emergency Plan (includes business continuity)	Civil Contingencies Act	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED9.22	Offsite and Adventurous	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.23	Planning	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.24	School Files	Securely dispose 6 years after date last modified	Delete 6 years after date superseded	Special Category Data		Business agreed retention period	
ED9.25	Property	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.26	Safeguarding	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED9.27	Sites	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## ED10 Teaching

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED10.1	Teacher Development	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	NQT handbook, guidance & forms, Community Learning observations. implementation support for teaching, measuring impact, emails	Business agreed retention period	Contract
ED10.2	Mentoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to the management of learning mentors	Limitation Act 1980 (Section 2)	Contract
ED10.3	Teaching Assistants	Securely dispose 7 years after end of employment	Delete 7 years after date employment terminated	Personal	Records relating to teaching assistants	Business agreed retention period	Contract
ED10.4	Student Teachers	Securely dispose 6 years after date placement ended	Delete 6 years after date placement ended	Personal	Records relating to student teachers/student placements	Business agreed retention period	Contract
ED10.5	Volunteers	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Records relating to volunteers	Business agreed retention period	Contract
ED10.6	Direct Teaching	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	1-2-1 teaching, teaching plans, teaching timetables	Business agreed retention period	Public Task
ED10.7	Resources	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	Special Category Data	"Teaching materials, worksheets (EAL materials), Teaching resources by subject, Assessment Resources. pupil work, transition, resources and training. Autism support "	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED10.8</b>	Newly Qualified Teachers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	NQT Programme, Contact list of NQTs, Compliance documentation, Record of visits, Observation notes, Pro-formas	The National Archives Best Practice	Legal

## ED11 Inspections and Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED11.1	OFSTED	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal	"Service Ofsted reports, Monitoring letters, Publications, Guidance, Crib Sheet, Expectations of Governors, Training, Self-assessment Report, Quality Improvement Plans, Up to date EIF, Supplementary handbooks "	Business agreed retention period	Legal
ED11.2	Reports	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Individualised Learning Record reports from Education and Skills Funding Agency, Sub-contract monitoring reports	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Not Required
ED11.4	Building Safety Inspections	Securely dispose 6 years after life of building	Delete 6 years after building life end	None	Risk assessments,	Limitation Act 1980 (Section 2)	Not Required
ED11.5	Schools Reports	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Annual Reports required by the Department for Education and Skills	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Not Required
ED11.6	Moderation	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data	" Internal and external verifier reports, internal moderation logs, Visit reports for moderation are stored on a secure online portal (Pendulum), not in our files. Training materials, LA plans and policy documents, letter templates etc. "	Business agreed retention period	Legal



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED11.7	Compliance	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Sub-contract monitoring reports, signed learner agreements, insurance details (hirers), complaints and comments log	Business agreed retention period	Legal
ED11.8	Safeguarding Audits	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal	Audit Reports, Audits, Adult safeguarding incident log, activity risk assessments, personal risk assessments	Education Act 2002, s175	Legal
ED11.9	Special Educational Needs - Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Audit reports	Education (Pupil Information) (England) Regulations 2000. S 408 & 563 The School Standards & Framework Act 1998	Not Required
ED11.10	Quality and Assurance				Reports		Not Required
ED11.11	School Files						
ED11.12	Safeguarding Adults Restricted	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal		Education Act 2002, s175	
ED11.13	Safeguarding Adults	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal		Education Act 2002, s175	



## ED12 Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED12.1	Meetings	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Meeting minutes, emails, agendas and actions	Limitation Act 1980 (Section 2)	None
ED12.2	Department for Education	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Reports	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Not Required
ED12.3	OSA	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	complaints regarding School Admissions	Limitation Act 1980 (Section 2)	Public Task
ED12.4	Education School Funding Agency	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	School Admissions reporting non-compliant schools	Limitation Act 1980 (Section 2)	Legal
ED12.5	Head teacher Representation Groups	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Agenda, minutes	School Admissions Code 2012	Legal
ED12.6	Networking	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## ED13 Service Level Agreements

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED13.1</b>	Service Level Agreements	Securely dispose 6 years after agreement has expired	Delete 6 years after agreement has expired	Personal	Service level agreements and supporting documents.	Limitation Act 1980 (Section 2)	Contract
<b>ED13.2</b>	Educational Psychology	Securely dispose 6 years after agreement has expired	Delete 6 years after agreement has expired	Personal		Limitation Act 1980 (Section 2)	

## ED14 Assessments and Observations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED14.1	Educational Psychology Assessment and Reporting	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Special Category Data	Assessments, Consultations, Reports,	Education Act 1996	Legal
ED14.2	Support for Learning	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Special Category Data	Referral forms, assessments forms, reports, observations, scanned tests	Limitation Act 1980 (Section 2)	Public Task
ED14.3	Behaviour Support	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Special Category Data	referral forms, pupil observations, visit records, consultation forms, pupil evaluation tools, notes and progress for schools and pupils	Limitation Act 1980 (Section 2)	Public Task
ED14.4	Virtual School	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal	Tuition monitoring reports. EAL assessment and reports to parents	Business agreed retention period	Public Task
ED14.5	School Improvement	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	"NQT assessment forms and records, Contact records, SMB Agenda, SMB Minutes, Termly STEP reports, other Quality of Education reports "	Business agreed retention period	Public Task
ED14.6	Community Learning - Pearson	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Portfolios, awarding body reports, exam entries	Business agreed retention period	Public Task
ED14.7	Community Learning - Education and Skills Funding Agency	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Evaluation forms, learner action plans	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED14.8</b>	Autism Support	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Special Category Data	reports, observations, consultations, pupil profile, EHC reports, pupil files	Business agreed retention period	Public Task
<b>ED14.9</b>	SEN						

## ED15 Training

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED15.1</b>	Training	Securely dispose 7 years after date employment terminated	Delete 7 years after date employment terminated	Personal	Feedback forms, Training dates/schedules, Templates, resources, INSET Training Plans. Attendance records, bookings, onsite training, venue, trainers, conference. Standards & Effectiveness, Training Budget, self-assessment forms, training spreadsheet	Business agreed retention period	Public Task
<b>ED15.2</b>	Training Materials	Retain until superseded	Retain until superseded	Personal	Copies of handouts / slides, Training resources. Governor training, BST course materials	Business agreed retention period	Public Task
<b>ED15.3</b>	Education Psychology	Securely dispose 2 years after date superseded	Delete 2 years after date superseded	Personal	Training courses, materials, certificates, list of attendees,	Business agreed retention period	Public Task
<b>ED15.4</b>	Safeguarding Training	Securely dispose 7 years after date employment terminated	Delete 7 years after date employment terminated	None	Training courses, materials, certificates, list of attendees,	Education Act 2002, s175	Not Required
<b>ED15.5</b>	Team Teach Training - Behaviour Support	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Team teach training materials, attendance lists, evaluation forms, personal consent forms, risk assessments, training log, invoices	Business agreed retention period	Public Task
<b>ED15.6</b>	Autism Support	Securely dispose 2 years	Delete 2 years after date superseded	Personal	Training courses, materials, certificates, list of attendees,	Business agreed	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
		after date superseded				retention period	
<b>ED15.7</b>	Virtual School	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
<b>ED15.8</b>	Early Years	Retain until superseded	Retain until superseded	Personal		Business agreed retention period	
<b>ED15.9</b>	Support for Learning	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	Personal		Business agreed retention period	



## ED16 Data Collection and Statistics

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED16.1	Support for Learning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Can Do Database, Feedback analysis, raw data, analytics and statistics	Business agreed retention period	Public Task
ED16.2	Educational Psychology	Keep permanently	Keep permanently	Special Category Data	Research, Statistics, Reports, Service Priority Plans	Business agreed retention period	Public Task
ED16.3	Virtual School	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	reports from external sources (Welfare Call). EAL audit sheet	The National Archives Best Practice	Public Task
ED16.4	School Improvement	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	"Collection of EYFS, KS1 & phonics data from schools. Data for statutory returns. Reports from DfE and other external sites (MIME), MIME, KS2 results sheet, EYFS results sheet, GCSE results sheet, A-Level results sheet, data collection pro-formas, FFT reports, PPG info, SEND info "	Business agreed retention period	Legal
ED16.6	Admissions	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	analysis of applications	School Admission Appeals Code 2011	Not Required
ED16.7	Special Educational Needs Analytics	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Statistics, Reports, Records, Consultations, Data	Business agreed retention period	Public Task

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED16.8</b>	Adult Learners	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Benchmarking data, Education Equalities Report, Course Directory Portal Submission, All course list, Performance Data	Business agreed retention period	Public Task
<b>ED16.9</b>	Behaviour Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	BST log, staff self-assessment forms, pupil/parent evaluations, pupil evaluation tools, general feedback forms, data spreadsheets, satisfaction surveys, feedback via email	The National Archives Best Practice	Public Task
<b>ED16.10</b>	Autism Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Data	Business agreed retention period	Public Task
<b>ED16.11</b>	SEN						
<b>ED16.12</b>	Community Learning Data - Restricted	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## ED17 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED17.1	Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Standards & Effectiveness Reports to Elected Members. CAMHS reports (autism support access only)	Business agreed retention period	Legal
ED17.2	Education Skills and Funding Agency	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Individualised Learner Record data uploads and downloads, Education and Skills Funding Agency funding claims	Education and Skills Funding Agency	Legal
ED17.3	School Improvements	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	School Improvement Reports	Business agreed retention period	Not Required
ED17.4	Education Psychology	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Business agreed retention period	
ED17.5	Pupil	Securely dispose 21 years after date of child's birth	Delete 21 years after date of child's birth	Special Category Data		Business agreed retention period	
ED17.6	SEN						

## ED18 Financial Support

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED18.1	Pupils	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Pupil Premium expenditure monitoring sheet, Journal/invoices for pupil support	HMRC - Compliance Handbook Manual CH15400	Legal
ED18.2	Schools	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Journals/invoices FFT agreement and journals, budget spreadsheets	HMRC - Compliance Handbook Manual CH15400	Legal
ED18.3	Educational and Learning	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Journals/invoices, budget tracking spreadsheet, Orders	HMRC - Compliance Handbook Manual CH15400	Legal
ED18.4	Community Learning	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Budget monitoring, invoices, invoice tracker	HMRC - Compliance Handbook Manual CH15400	Legal
ED18.5	Open Learning Centre	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Hire agreements, budget monitoring, leases,	HMRC - Compliance Handbook Manual CH15400	Legal
ED18.6	Children Support Services	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		HMRC - Compliance Handbook Manual CH15400	
ED18.7	SEN Placements Costings	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
ED18.8	Community Learning Audits	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data		HMRC - Compliance Handbook Manual CH15400	
ED18.9	Community Learning Restricted	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data		HMRC - Compliance Handbook Manual CH15400	

## ED19 Education Safeguarding

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>ED19.1</b>	Domestic Abuse Reports	Securely dispose 75 years after date case closed	Delete 75 years after date case closed	Special Category Data	Police reports, email correspondence	Limitation Act 1980 (Section 2)	Legal
<b>ED19.2</b>	Multi Agency	Securely dispose 75 years after date case closed	Delete 75 years after date case closed	Special Category Data	Meetings minutes, agendas, action logs, reports	Children Act 2004, Working Together to Safeguard Children 2010	Legal
<b>ED19.3</b>	Safeguarding Case Files	Securely dispose 75 years after date case closed	Delete 75 years after date case closed	Special Category Data	Case file to include minutes of minutes, home visit records. Case notes and emails correspondence	Children Act 2004, Working Together to Safeguard Children 2010	Legal
<b>ED19.4</b>	Analytics	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None	Data for reporting, reports	Business agreed retention period	Not Required
<b>ED19.5</b>	Confidential	Securely dispose 25 years after date last modified	Delete 25 years after date last modified	Personal		Business agreed retention period	
<b>ED19.6</b>	Ofsted Complaints	Securely dispose 25 years after date last modified	Delete 25 years after date last modified	Personal		Business agreed retention period	

## ED20 School Leadership

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED20.1	EYFS	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to EYFS	The National Archives Best Practice	
ED20.2	Assessment	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to school assessment	The National Archives Best Practice	
ED20.3	PPG	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to PPG	The National Archives Best Practice	
ED20.4	SEND	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to SEND	The National Archives Best Practice	
ED20.5	Post 16	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to Post 16 student	The National Archives Best Practice	
ED20.6	Safeguarding	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to Safeguarding	The National Archives Best Practice	
ED20.7	Strategic Area of Leadership	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to Strategic Area of Leadership	The National Archives Best Practice	

## ED21 Early Years

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
ED21.1	Child Development Centre	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Personal		Limitation Act 1980 (Section 8)	
ED21.2	Quality & Development	Securely dispose 25 years after date of birth	Delete 25 years after date of birth	Special Category Data		Limitation Act 1980 (Section 8)	
ED21.3	Sustainability & Sufficiency	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Special Category Data		Business agreed retention period	
ED21.4	Free Entitlement Business Support	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
ED21.5	Management and Planning	Securely dispose 25 years after date last modified	Delete 25 years after date last modified	Personal		Business agreed retention period	

# Retention and Disposal Schedule

## Environmental Health and Licensing



## EH1 Advice

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH1.1</b>	Business Advice	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Service requests, responses, emails, reports	Business agreed retention period	Public Task
<b>EH1.2</b>	Public Advice	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Service requests, responses, emails, reports	Business agreed retention period	Public Task
<b>EH1.3</b>	Guidance and Resources	Secure disposal 6 years after date superseded	Delete 6 years after date superseded	None	Guidance, information leaflets	Limitation Act 1980 (Section 2)	Not Required

## EH2 Complaints

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH2.1</b>	Environmental Services Complaints	Securely dispose 6 years after complaint resolved	Delete 6 years after date last modified	Personal	Emails, letters, phone calls	Business agreed retention period	Legal
<b>EH2.2</b>	Licensing Complaints	Securely dispose 6 years after complaint resolved	Delete 6 years after date last modified	Personal	Emails, letters, phone calls	Business agreed retention period	Legal
<b>EH2.3</b>	Trading Standards Complaints	Securely dispose 6 years after complaint resolved	Delete 6 years after date last modified	Personal	Emails, letters, phone calls	Business agreed retention period	Legal

## EH3 Enforcement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH3.1</b>	Environmental Health	Securely dispose 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	Letters, emails, photos, reports, witness statements, court documents	Business agreed retention period	Legal
<b>EH3.2</b>	Licensing	Securely dispose 6 years after date case closed	Delete 6 years after date case closed	Personal	Letters, emails, photos, reports, witness statements, court documents	Licensing Act 2003	Legal
<b>EH3.3</b>	Prosecutions	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Letters, emails, photos, reports, witness statements, court documents	Business agreed retention period	Legal

## EH4 Environmental Health

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH4.1</b>	Animal Control	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Inspection forms, letters, reports, photos, emails	Animal Welfare Act 2006, Animal Boarding Establishments Act 1963, Riding Establishments Act 1964 & 1970	Legal
<b>EH4.2</b>	Food Premises	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Inspection forms, letters, reports, photos, emails	The Food Safety Act 1990, The Food Safety and Hygiene (England) Regulations 2013, The General Food Regulations 2004	Legal
<b>EH4.3</b>	Permits	Securely dispose 6 years after date permit expired	Delete 6 years after date permit ended	Personal	Records relating to permits issued	Business agreed retention period	Legal
<b>EH4.4</b>	Repatriation of Deceased Persons	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	Personal	All records relating to the repatriation of bodies	Data Protection Act 2018	Legal

## EH5 Licensing

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
EH5.1	Alcohol & Entertainment	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Licensing Act 2003	Legal
EH5.2	Animals	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Animal Welfare Act 2006, Animal Boarding Establishments Act 1963, Riding Establishments Act 1964 & 1970	Legal
EH5.3	Caravan Sites	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Caravan Sites and Control of Development Act 1960, Caravan Sites Act 1968	Legal
EH5.4	Charity Collection	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Charities Act 2011	Legal
EH5.5	Gambling	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Gambling Act 2005	Legal
EH5.6	Highways Act S.115E	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, Licences	Highways Act 1980	Legal
EH5.7	Scrap Metal Dealers	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Scrap Metal Dealers Act 2013	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH5.8</b>	Sex Establishments	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Local Government (Miscellaneous Provisions) Act 1982	Legal
<b>EH5.9</b>	Skin Piercing	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Business agreed retention period	Legal
<b>EH5.10</b>	Street Trading	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	Local Government (Miscellaneous Provisions) Act 1982	Legal
<b>EH5.11</b>	Taxis	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents, vehicle documents, MOTs etc	Local Government (Miscellaneous Provisions) Act 1982	Legal
<b>EH5.12</b>	Dangerous Dogs	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	All records relating to the enforcement action relating to dangerous dogs	Dangerous Dogs Act 1991	Legal
<b>EH5.12</b>	Licensing Shared Documents	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	Legal
<b>EH5.13</b>	Food Premises	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Special Category Data	Applications, licenses, ID documents	The Food Safety Act 1990, The Food Safety and Hygiene (England) Regulations 2013, The General Food Regulations 2004	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH5.14</b>	House of Multiple Occupation	Keep 30 years for all supplies	Keep 30 years for all supplies	Special Category Data		Private Water Supply Regulations 2009	Legal
<b>EH5.15</b>	Other Licenses	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	Legal
<b>EH5.16</b>	Petroleum	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Petroleum Acts	Legal
<b>EH5.17</b>	Explosives	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Explosives Acts 1875	Legal

## EH6 Investigation, Inspections and Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH 6.1</b>	Inspections	Securely dispose 6 years after date of report	Delete 6 years after date last modified	Special Category Data	Inspection reports, samples, visit sheets	Business agreed retention period	Legal
<b>EH6.2</b>	Investigations	Securely dispose 7 years after date last modified. If a minor, until they reach 21 years of age	Delete 7 years after date last modified. If a minor, until they reach 21 years of age	Special Category Data	Investigations, Interview Evidence, Reports	Regulation of Investigatory Powers Act Part 2	Legal
<b>EH6.3</b>	Monitoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Monitoring data, reports	Regulation of Investigatory Powers Act Part 2	Legal
<b>EH6.4</b>	Private Water Supplies	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	Legal



## EH7 Registration, Certification and Permits

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
EH7.1	Permits (by License)	Securely dispose 6 years after date permit expired	Delete 6 years after date permit ended	Personal	Application forms, emails, letters, permits	Business agreed retention period	Legal
EH7.2	Certificates (by License)	Securely dispose 6 years after date certificate revoked/expired	Delete 6 years after date revoked/expired	Personal	Environmental health certificates	Business agreed retention period	Legal
EH7.3	Registers (by License)	Securely dispose 6 years after date registration ended	Delete 6 years after date registration ended	Personal	Registration forms, emails, letters	Business agreed retention period	Legal

## EH8 Stakeholder Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
EH8.1	Agreements	Securely dispose 6 years after last modified	Delete 6 years after last modified	Personal	Agreements and supporting documents	Business agreed retention period	Contract
EH8.2	Outsourcing	Securely destroy 6 years after contract end	Delete 6 years after date contract ended	Personal	Contract, Agreements and supporting documents	Limitation Act 1980 ( Section 8)	Contract
EH8.3	Consultations	Securely dispose 6 years after date of response	Delete 6 years after date last modified	Personal	Records relating to responses to consultations	Business agreed retention period	Consent
EH8.4	Regional Forums	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, safety plans, reports, letters, photos, emails	Business agreed retention period	Not required
EH8.5	Internal Meetings	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Minutes, agendas, actions	Business agreed retention period	Not required

## EH9 Campaigns

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH9.1</b>	Clean Neighbourhood	Offer to Archives 3 years after date last modified	Send to Archives 3 years after date last modified	None	Campaign documents/materials	Business agreed retention period	Not Required
<b>EH9.2</b>	Consumer Protection	Offer to Archives 3 years after date last modified	Send to Archives 3 years after date last modified	None	Campaign documents/materials	Business agreed retention period	Not Required
<b>EH9.3</b>	Dog Control	Offer to Archives 3 years after date last modified	Send to Archives 3 years after date last modified	None	Campaign documents/materials	Business agreed retention period	Not Required
<b>EH9.4</b>	Scams & Doorstop Crime	Securely dispose 6 years after last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	Not Required

## EH10 Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>EH10.1</b>	ISO Compliance	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	ISO compliance register	ISO Retention Requirements.	Not Required
<b>EH10.2</b>	Legislation	Keep permanently	Keep permanently	None	Environmental health and licensing legislation	Business agreed retention period	Not Required
<b>EH10.3</b>	External Audits	Securely dispose 5 years after date audit completed	Delete 5 years after date completed	None	External audit reports and letters	Business agreed retention period	Not Required

# Retention and Disposal Schedule

## Finance

## FIN2 Asset Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN2.1</b>	Fixed Asset Register	Keep permanently	Keep permanently	None	Detailed spreadsheet held by finance team	Business agreed retention period	Not required
<b>FIN2.2</b>	Maintaining Assets	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Asset Registers, Asset Logs	Business agreed retention period	Not required
<b>FIN2.3</b>	Valuations	Keep permanently	Keep permanently	None	Detailed Valuations, Register of valuations of properties	Business agreed retention period	Not required

## FIN3 Financial Income

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN3.1</b>	Debtors	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Raising invoices/credit, aged debt, direct debits, write offs, reconciliation, transfers/refunds, month end reports	Business agreed retention period	Public Task
<b>FIN3.2</b>	Adult Social Care Debtors	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Raising invoices/credit, aged debt, direct debits, write offs, reconciliation, transfers/refunds, month end reports	Business agreed retention period	Not Required
<b>FIN3.3</b>	Traded Services	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Income & expenditure accounts for services provided by council	Business agreed retention period	Not Required
<b>FIN3.4</b>	Refunds	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Refund records, accounts, payment records, remittance advices	Business agreed retention period	Not Required
<b>FIN3.5</b>	Grants and other contributions	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## FIN4 Financial Payments

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN4.1</b>	Adult Social Care Creditors	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Invoices	Business agreed retention period	Public Task
<b>FIN4.2</b>	Creditors	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Invoices	Business agreed retention period	Public Task
<b>FIN4.3</b>	Petty Cash	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Petty cash accounts	Business agreed retention period	Not Required
<b>FIN4.4</b>	Procurement Cards	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Details of bank, Card details, Transactions	Business agreed retention period	Not Required
<b>FIN4.5</b>	Suppliers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	



## FIN5 Treasury Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN5.1</b>	Banking	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Bank account details, all banking resources	Business agreed retention period	Not Required
<b>FIN5.2</b>	Cash Flow	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Detailed spreadsheet held by finance team	Business agreed retention period	Not Required
<b>FIN5.3</b>	Investments	Retain until superseded	Retain until superseded	None	Council investments & correspondence	Business agreed retention period	Not Required
<b>FIN5.4</b>	Loans and Borrowing	Retain until superseded	Retain until superseded	None	Lending records & correspondence	Business agreed retention period	Not Required
<b>FIN5.5</b>	Monitoring and Reporting	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Financial reports	Business agreed retention period	Not Required
<b>FIN5.6</b>	Treasury Strategy	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Guidance, Advice, Procedures	Business agreed retention period	Not Required
<b>FIN5.7</b>	Year End and Audit	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## FIN6 Taxation

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN6.1</b>	Construction Industry Scheme	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal	Register of CIS payments	Business agreed retention period	Not Required
<b>FIN6.2</b>	Other Taxation	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>FIN6.3</b>	Partial Exemption	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	None	Exemption reports & records	Business agreed retention period	Not Required
<b>FIN6.4</b>	Tax Guidance	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Tax returns	Business agreed retention period	Not Required
<b>FIN6.5</b>	VAT	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	None	VAT certification, VAT returns & records	Business agreed retention period	Not Required

## FIN7 Revenues and Benefits

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
FIN7.1	Benefits	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal	All records relating to assistance with applications with complex benefit appeals	The National Archives Best Practice	Not Required
FIN7.2	Business Rates	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
FIN7.3	Council Tax	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
FIN7.4	Revenues	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
FIN7.5	Subsidies	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
FIN7.6	Systems	Secure disposal 7 years from date last modified	Delete 7 years after date last modified	Personal	Systems information	The National Archives Best Practice	Not Required
FIN7.7	Revenues - Reference	Retain until superseded	Retain until superseded	Personal		Business agreed retention period	
FIN7.8	Revenues - Administration	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
FIN7.9	Revenues - Processing	Secure disposal 1 month from date last modified	Delete 1 month after date last modified	Personal		Business agreed retention period	
FIN7.10	Revenues - Management	Retain until superseded	Retain until superseded	Personal		Business agreed retention period	

## FIN8 Accounting and Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN8.1</b>	Accounting Systems	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>FIN8.2</b>	Business Planning	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>FIN8.3</b>	Council Accounts	Keep permanently	Keep permanently	None	All council accounts, Income and expenditure	HMRC - Compliance Handbook Manual CH15400	Not Required
<b>FIN8.4</b>	Departmental Accounts	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None	Detailed spreadsheet held by finance team. Actual statement is published on council website.	Business agreed retention period	Not Required
<b>FIN8.5</b>	Government Accounts	Keep permanently	Keep permanently	None	Accounts, Income, Receipts, Reports	HMRC - Compliance Handbook Manual CH15400	Not Required
<b>FIN8.6</b>	Group Accounts	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>FIN8.7</b>	Reconciliations	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>FIN8.8</b>	Returns	Secure disposal 6 years from date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## FIN9 Budget Planning and Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN9.1</b>	Budget Monitoring	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>FIN9.2</b>	Budget Setting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Detailed spreadsheet held by finance team. Committee Report	Business agreed retention period	Public Task
<b>FIN9.3</b>	Corporate Budgets	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Corporate budget information	Business agreed retention period	Not Required
<b>FIN9.4</b>	Directorate Budgets	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Departmental budget information	Business agreed retention period	Public Task
<b>FIN9.5</b>	Medium Term Financial Strategy	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>FIN9.6</b>	Schools Budget	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Detailed spreadsheet held by finance team	Business agreed retention period	Public Task

## FIN10 Payroll

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FIN10.1</b>	BFC Employees Payroll	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal	Overpayments, Urgent payments, BACS recall, Costing journals, account	Business agreed retention period	Legal
<b>FIN10.2</b>	Maternity	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal	SMP P's, Paternity, Adoption, Maternity	Business agreed retention period	Legal
<b>FIN10.3</b>	Non BFC Payroll	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal		Business agreed retention period	
<b>FIN10.4</b>	Pensions	Retain until superseded	Retain until superseded	Personal	Time & mileage, payroll reports, deadline, year end, audit, payments	Business agreed retention period	Legal
<b>FIN10.5</b>	Reports	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal	Time & mileage, payroll reports, deadline, year end, audit, payments	Business agreed retention period	Legal
<b>FIN10.6</b>	Sickness Payments	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Personal	Long term sickness, SSP1	Business agreed retention period	Legal

# Retention and Disposal Schedule

## Forestcare

## FC1 Equipment

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC1.1</b>	Maintenance	Keep permanently	Keep permanently	None	Disaster Recovery Plans, Auto-low battery reports, background call logs, Non activation reports	Limitation Act 1980 (Section 2)	Not Required
<b>FC1.2</b>	Equipment Information	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Tunstall Equipment training, Raizer Chair training, Possom Training and Pocket Pal Training	Business agreed retention period	Legal
<b>FC1.4</b>	Products - Telecare	Securely dispose 2 years after date superseded	Delete 2 years after date superseded	None	Product catalogues	Business agreed retention period	Not Required



## FC2 Marketing

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC2.2</b>	Pricing	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Pricing lists, inserts	Business agreed retention period	Not Required
<b>FC2.3</b>	Literature	Securely dispose 5 years after date superseded	Delete 5 years after date superseded	None	Leaflets and marketing material, campaign materials	Business agreed retention period	Not Required

## FC3 Finance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC3.1</b>	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Procedures and guidance	Business agreed retention period	Not Required
<b>FC3.2</b>	Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Termination and New Clients reports, key holder and responder reports	HMRC - Compliance Handbook Manual CH15400	Legal
<b>FC3.3</b>	Forms	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Termination and new client forms, key holder forms	HMRC - Compliance Handbook Manual CH15400	Not Required
<b>FC3.4</b>	Lone Worker	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		HMRC - Compliance Handbook Manual CH15401	Not Required
<b>FC3.5</b>	Agresso	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		HMRC - Compliance Handbook Manual CH15402	Not Required
<b>FC3.6</b>	Invoices	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		HMRC - Compliance Handbook Manual CH15400	
<b>FC3.7</b>	Supplier Information	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		HMRC - Compliance Handbook Manual CH15400	

## FC5 Operational

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC5.1</b>	Assessments and Advice	Securely dispose 1 year after date service ended	Delete 1 year from date service has ended.	Special Category Data	Care plans and reviews, referral forms	TSA Guidance	Public Task
<b>FC5.4</b>	Forms & Letters	Securely dispose 1 year after date service ended	Delete 1 year from date service has ended.	None	Service level agreements, formal letters	TSA Guidance	Not Required
<b>FC5.5</b>	Monitoring	Securely dispose 1 year after date service ended	Delete 1 year from date service has ended.	Special Category Data	Call monitoring data	TSA Guidance	Public Task
<b>FC5.7</b>	Rota's	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	Personal	Staff rota's, external customer rota's	Business agreed retention period	None
<b>FC5.9</b>	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Guidance and procedures	Business agreed retention period	Not Required

## FC8 Managers

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC8.1</b>	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Managers procedures for operational and business requirements	Business agreed retention period	Not Required
<b>FC8.2</b>	Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Shift statistics, call reports, complaints report	Business agreed retention period	Legal
<b>FC8.3</b>	Forms	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Overnight system and operational checks, handover shift sheets	Business agreed retention period	Not Required
<b>FC8.4</b>	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, actions	Business agreed retention period	Not Required
<b>FC8.5</b>	Call Concerns	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None	Staff issues and complaints	Limitation Act 1980 (Section 2)	Not Required

## FC9 HR Documents

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC9.1</b>	Absence	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Absence reports, sickness reporting and annual leave	Business agreed retention period	Legal
<b>FC9.4</b>	Staff Files	Securely dispose 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data	Employees files	Business agreed retention period	Contract
<b>FC9.6</b>	Payroll	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal		Business agreed retention period	

## FC10 Audit

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>FC10.1</b>	TSA	Secure dispose 6 years after date of completion	Delete 6 years after date last modified	None	Reports	Business agreed retention period	Not Required
<b>FC10.2</b>	CQC	Secure dispose 6 years after date of completion	Delete 6 years after date last modified	None	Reports	Business agreed retention period	Not Required

# Retention and Disposal Schedule

## Health and Safety

## HS1 Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS1.1	Accident and Incident Reporting	Send to personnel file 7 years after date last modified	Send to personnel file 7 years after date last modified	Personal	Online report, investigations and reports - accident reporting	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1985	Legal
HS1.2	Accidents and Incident Reporting involving Children under the age of 18	Securely dispose on child's 21st birthday	Secure deletion on child's 21st birthday	Personal	Online report, investigations and reports - accident reporting involving children	The Wolfe Report, Public Liability	Legal
HS1.3	Compliance Monitoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Inspections, reports, actions plan for managers	Business agreed retention period	Public Task
HS1.4	Bracknell Alert Dangerous Persons Register(HS)	Review annually and remove records over 3 years old	Review annually and remove records over 3 years old	Personal	Database with register of dangerous people or locations	Business agreed retention period	Public Task



## HS2 Advice

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS2.1	Guidance and Manuals	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Corporate Manuals, Schools Manuals, Guidance	Business agreed retention period	Not Required
HS2.2	Enquiries	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Verbal, email or visit enquires from Bracknell Locations	The National Archives Best Practice	Public Task
HS2.3	Training	Securely dispose 7 years after date created	Delete 7 years after date created	None	Presentations and training, online training for health and safety	Business agreed retention period	Not Required
HS2.4	Campaigns	Securely dispose 3 years after date created	Delete 3 years after date created	None	Seasonal campaigns for specific topics, Newsletters	Business agreed retention period	Not Required

## HS3 Risk Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS3.1	Adult Care Services	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.2	Children and Families Services	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.3	Communications	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.4	Community and Libraries	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.5	Community Safety and Emergencies	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.6	Crematoria and Cemeteries	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS3.7	Customer Services	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.8	Democracy	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.9	Economy and Regeneration	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.10	Education	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.11	Finance	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.12	Forestcare	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.13	Health and Safety	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>HS3.14</b>	Human Resources	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.15</b>	ICT	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.16</b>	Information Management	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.17</b>	Insurance and Risk Management	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.18</b>	Internal Audit	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.19</b>	Leadership	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
<b>HS3.20</b>	Legal Services	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS3.21	Parks and Countryside	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.22	Planning and Building Control	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.23	Procurement	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.24	Property	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.25	Public Health	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.26	Registration Services	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal
HS3.27	Transport	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>HS3.28</b>	Waste	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	Personal	Risk Assessments, reports, actions for improvement meeting minutes, hazardous substance registers, equipment registers	Health & Safety Act 1974	Legal

## HS4 Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HS4.4	Policy and Strategy	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Polices, Strategy (reviewed annually)	Business agreed retention period	Not Required

# Retention and Disposal Schedule

## **Housing**

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## HO1 Communication

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Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO1.1	Guidance	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			
HO1.2	Procedures	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			

## HO2 Housing Needs

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO2.1	Accommodation Officers	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.2	Experian Checks	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			
HO2.3	Gypsy and Traveller	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.4	Homeless Applications	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.5	Housing Finance	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			
HO2.6	Housing Needs Assessments	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.7	Housing Public Protection	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	None			
HO2.8	Medical Information	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.9	Police Checks	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO2.10	Reviews	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO2.11	Systems	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	None			
HO2.12	Housing Demand and Performance	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			

## HO3 Housing Register

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO3.1	Housing Register Allocations	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Personal			
HO3.2	Housing Register Applications	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO3.3	Housing Register Transfer Applications	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO3.4	Medical Information	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO3.5	Sheltered Accommodation	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO3.6	SLA and Noms	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				

## HO4 Housing Stock

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO4.1	Downshire Homes Limited	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.2	Emergency Maintenance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.3	Fit and Proper Landlord	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.4	Housing Grants	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.5	Leases	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.6	Legislation	Retain until superseded	Retain until superseded	None			
HO4.7	Planned Maintenance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.8	Property Adaptations	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.9	Property Checks and Certificates	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO4.10	Repairs and Renovations	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO4.11	Reporting	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.12	Right to Rent Checks	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.13	Risk Assessments	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.14	Unauthorised Occupants	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.15	Warm, Safe and Well	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO4.16	ENERGY	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None		Business agreed retention period	

## HO5 Housing Strategy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO5.1	16-17 year old	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.2	Capital Projects	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.3	Homelessness Strategy	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.4	Housing Strategy	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.5	Assessment	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.6	S106 Agreements	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HO5.7	Strategic Housing Market Assessment	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## HO6 Housing Support

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO6.1	Berkshire Womens Aid	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO6.2	CTPLD	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO6.3	Life Housing	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO6.4	Look Ahead	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				
HO6.5	Contract Monitoring	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified				



## HO7 Managing Tenancies

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO7.1	Adaptations	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.2	Adaptations Grants	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.3	Advice	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal			
HO7.4	Agreements	Keep permanently	Keep permanently	None		Limitation Act 1980 (Section 2)	
HO7.5	Anti Social Behaviour	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.6	Approving Alterations	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.7	Breaches	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.8	Evictions	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO7.9	Extra Care	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.10	Housing Repairs	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO7.11	Insurance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO7.12	Rent Arrears	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.13	Rent Deposits	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.14	Rent Setting	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO7.15	Right to Buy	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
HO7.16	Temporary Accommodation	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None			
HO7.17	Tenancies	Retain until superseded	Retain until superseded	Personal			

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>HO7.18</b>	Tenant Engagement	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				
<b>HO7.19</b>	Welfare Services	Securely dispose 7 years after date last modified	Delete 7 years after date last modified				

## HO8 Rough Sleepers

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO8.1	SWEP	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Special Category Data			
HO8.2	Liason	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	None			
HO8.3	Night Shelter	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Special Category Data			
HO8.4	Outreach	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Special Category Data			
HO8.5	Strategy	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	None			
HO8.6	Client List	Securely dispose 6 + 1 years after date last modified	Delete 7 years after date last modified	Special Category Data			

## HO9 Disabled Facilities Grant

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HO9.1	Contractors	Retain until contract terminated	Retain until contract terminated	Special Category Data		Business agreed retention period	
HO9.2	Home Adaptations	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	
HO9.3	Supporting Documentation	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	
HO9.4	Technical	Retain until superseded	Retain until superseded	Special Category Data		Business agreed retention period	

# Retention and Disposal Schedule

## Human Resources

## HR2 Advisory and Casework

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR2.1	Absence Monitoring	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Letters sent, informal and formal (by Surname First Name)	Business agreed retention period	Contract
HR2.2	Capability	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Letters sent, informal and formal (by Surname First Name), meeting notes, investigation reports, PIP	Business agreed retention period	Contract
HR2.3	Disciplinary	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Letters sent, informal and formal (by Surname First Name), meeting notes, investigation reports	Limitation Act 1980 (Section 2)	Contract
HR2.4	Disclosure of Interest	Secure disposal 1 year after termination of employment	Delete 1 year after date employment terminated	Special Category Data	Disclosures received, e.g. other jobs, politically restricted posts	Local Government Act 1972	Legal
HR2.5	Employment Tribunal	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Notification of ET, letters, legal papers	The Employment Tribunals (Constitution and Rules of Procedure) (Amendment) Regulations 2008; Limitation Act 1980 (Section 2)	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR2.6	Leavers & Exit Interviews	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Letters sent, informal and formal (by Surname First Name), meeting notes, investigation reports	Business agreed retention period	Contract
HR2.7	Grievances	Secure disposal 6 years after date case closed	Delete 6 years after date case closed	Special Category Data	JDs, spreadsheet of roles versus outcomes	Limitation Act 1980 (Section 2)	Legal
HR2.8	Job Evaluation	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Letters confirming dates and payments	Business agreed retention period	Contract
HR2.9	Maternity/Paternity Adoption	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	OH Reports, stress risk assessments, outcomes, recommendations	HMRC - Compliance Handbook Manual CH15400	Contract
HR2.10	Medical & Risk Assessments	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Redundancy figures, statements, letters, timetables, consultation documents, matrices, proposed and current structures, equality impacts, CMT reports	OSGG Regs 1994, Employment Records Code Part 4	Legal
HR2.11	Restructures & Redundancy	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	CQC referrals	Limitation Act 1980 (Section 2)	Public Task
HR2.12	Safeguarding	Keep permanently	Keep permanently	Special Category Data	Confirmation of settlements	Business agreed retention period	Legal
HR2.13	Settlement Agreements	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Exit interviews from leavers	Business agreed retention period	Contract



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR2.14	TUPE	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	Special Category Data	Due diligence reports, measures letters, letters, consultation documents, policies & procedures from TUPE company	Transfer of Undertakings (Protection of Employment) Regulations 2006	Legal
HR2.15	Complaints	Secure disposal 6 years after date created	Delete 6 years after date created	Special Category Data		Business agreed retention period	
HR2.16	External Advisory & Casework	Secure disposal 6 years after last employment date	Delete 6 years after last employment date	Special Category Data		Business agreed retention period	
HR2.17	Flexible Working	Secure disposal 6 years after last employment date	Delete 6 years after last employment date	Personal		Business agreed retention period	
HR2.18	Probations	Secure disposal 6 years after last employment date	Delete 6 years after last employment date	Personal		Business agreed retention period	
HR2.19	Redeployment	Secure disposal 6 years after last employment date	Delete 6 years after last employment date	Special Category Data		Business agreed retention period	
HR2.20	Whistleblowing	Secure disposal 6 years after date created	Delete 6 years after date created	Special Category Data		Business agreed retention period	
HR2.21	All Casework	Keep permanently	Keep permanently	Special Category Data		Business agreed retention period	

## HR3 Employee Relations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR3.1	Staff Surveys	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Staff survey analysis and reports, presentations	Limitation Act 1980 (Section 2)	None
HR3.2	Trade Union Liaison	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Notes, actions	Limitation Act 1980 (Section 2)	Legal
HR3.3	Strike Action	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Limitation Act 1980 (Section 2)	

## HR4 Recruitment

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR4.1	Advertising	Secure disposal 1 year after date last modified	Delete 1 year after date last modified	None	Adverts and Application Packs	Business agreed retention period	Not Required
HR4.2	Agency	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Agency lists and other docs. NB Contracts in Contracts folder	The National Archives Best Practice	Contract
HR4.3	Authorisation - Vacancy Panel	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	None	Historical records of vacancy panels for posts	Business agreed retention period	None
HR4.4	Induction	Secure disposal 6 months after date last modified	Delete 6 months after date last modified	Personal	Induction Docs and checklists etc.	Business agreed retention period	Contract
HR4.5	Job Descriptions and Person Specifications	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Master file of all JDS and PS	Limitation Act 1980 / Sex Discrimination Act 1975 + 1986 / Race Relations Act 1976	Not Required
HR4.6	Job Details and Applicants	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	Special Category Data	Working files for adverts currently advertised	The National Archives Best Practice	Legal
HR4.7	Migrant Workers	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Documents on sponsorship scheme and other immigration issues	Right to Work Checks	Legal
HR4.8	Monitoring	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	nb reporting in reports section	The National Archives Best Practice	Legal
HR4.9	New Starter documentation	Secure disposal 1 year after date last modified	Delete 1 year after date last modified	Special Category Data	New Starter folders, pre-employment questionnaire	Business agreed retention period	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR4.10	Pre-employment Checks	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data	Information on the different pre-employment checks and docs relating to them	Business agreed retention period	Legal
HR4.11	Probation	Secure disposal 1 year after employment terminated	Delete 1 year after employment terminated	Special Category Data	Probation process and forms	Business agreed retention period	Contract
HR4.12	Recruitment Initiatives and Events	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal Data	Careers Fairs, Recruitment campaigns etc.	Limitation Act 1980 (Section 2)	Legal
HR4.13	Recruitment Process	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Process Documents	Business agreed retention period	Not Required
HR4.14	Relocation / mortgage subsidy	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Personal Data	Information and Lists of staff receiving it etc.	The Income Tax (Employment) Regulations 1993	Legal
HR4.15	Secondment	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal Data	Information relating to secondments	The National Archives Best Practice	Legal
HR4.16	Volunteer Information	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Information relating to volunteers	Data Protection 2018	Legal
HR4.17	Recruitment Letters, Forms & Templates	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR4.18	Schools Recruitment	Secure disposal 7 years after last employment date	Delete 7 years after last employment date	Special Category Data		Business agreed retention period	

## HR5 Organisation Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR5.1	Apprenticeships	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Details of apprentices, contracts, providers, DFE info, LGA info	Limitation Act 1980 (Section 2)	Contract
HR5.2	Coaching	Secure disposal 2 years after date last modified	Delete 2 years after date last modified	Special Category Data	List of staff names, documents, forms, coaching contracts	Limitation Act 1980 (Section 2)	Contract
HR5.3	E-Learning	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Course content in production, images	Business agreed retention period	Not Required
HR5.4	Organisational Development Initiatives	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Process documents	Business agreed retention period	Not Required
HR5.5	Placements - Trainees	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	NMT, Placements, Trainee Social Workers: Contracts, personal data, training plans	Limitation Act 1980 (Section 2)	Contract
HR5.7	Training Resources	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Manuals, training files, instructions, training plan	Business agreed retention period	Not Required

## HR6 Reporting and Data

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR6.1	Ad Hoc Reporting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Ad hoc report requests	Business agreed retention period	Legal
HR6.2	Management Reporting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	QSRs, Quarterly Management reports, Counselling services, recruitment, agency	Business agreed retention period	Legal
HR6.3	Regular Reporting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Annual leave, increment process, pensions,	Business agreed retention period	Legal
HR6.4	Statutory Reporting	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Incl NMDS, Children's workforce return, workforce survey, SWC, vacancy survey etc., Teachers Pensions	Business agreed retention period	Legal
HR6.5	Strategic Plans and Presentations	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Council reports, Managers forum, Overview & Scrutiny, Service plans, Workforce plans	Business agreed retention period	Legal
HR6.6	Structure charts	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Structure chart planning, contact details	Business agreed retention period	Legal
HR6.7	Workforce Planning data	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Workforce Analytics, Reports and Presentations, Managers Forum inputs, Service Plans, SWFP, Recruitment	Business agreed retention period	Legal
HR6.8	Information Governance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR6.9	Reference and Contact Data	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	

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## HR7 Information and Guidance Library

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR7.1	Communications	Secure disposal 1 year after date last modified	Delete 1 year after date last modified	None	Developing comms messages from HR & OD	Records Management Code of Practice	Not Required
HR7.2	Terms and Conditions	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None		Limitation Act 1980 (Section 2)	
HR7.3	DBS and Safeguarding Guidance	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Contracts with suppliers and partners	Disclosure and Barring Service check requests: guidance for employers	Not Required
HR7.4	Equal Opportunities	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Date sent out only	Business agreed retention period	Not Required
HR7.5	Scheme of Delegation	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None		Business agreed retention period	Not Required
HR7.6	Service Contracts & Invoices	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None		Business agreed retention period	Not Required
HR7.7	Leave	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Initiatives by HR	Business agreed retention period	Not Required
HR7.8	Pay Awards	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Annual leave buy/sell	Business agreed retention period	Not Required
HR7.9	Pension	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Details of pay awards	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR7.10	Policy Briefing notes and Procedures	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	In draft policies, briefing notes and procedures, Workforce & OD Strategy	Limitation Act 1980 (Section 2)	Not Required
HR7.11	Retention Payments	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Posts with retention payments	Business agreed retention period	Not Required
HR7.12	Services to schools / SLA	Secure disposal 6 years after date agreement ended	Delete 6 years after date agreement ended	None	Services to schools and SLAs	Limitation Act 1980 (Section 2)	Not Required
HR7.13	Staff Benefits	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	OH, Counselling, gym membership, dental plan, shopping vouchers, childcare vouchers, bike to work, private health, discounts, travel season tickets	Business agreed retention period	Not Required
HR7.14	Standard Letters, Forms and Templates	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Templates	Business agreed retention period	Not Required
HR7.15	Systems	Retain for life of system	Retain for life of system	None	Information on systems	Business agreed retention period	Not Required
HR7.16	Policy Briefing notes & Procedures - Schools	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	In draft policies, briefing notes and procedures, Workforce & OD Strategy	Limitation Act 1980 (Section 2)	Not Required
HR7.17	Standard Letters, Forms and Templates - Schools	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None	Templates	Business agreed retention period	Not Required
HR7.18	Trade Unions	Secure disposal 7 years after date created	Delete 7 years after date created	None		Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR7.19	User Guides	Secure disposal 6 years after superseded	Delete 6 years after date superseded	None		Business agreed retention period	Not Required

## HR8 Staff Files

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR8.1	Employee Records	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data		Limitation Act 1980 (Section 2)	
HR8.2	Agency Worker Files	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data		Limitation Act 1980 (Section 2)	
HR8.3	Employee Files - External Schools	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data		Limitation Act 1980 (Section 2)	
HR8.4	Future - Other Councils or Academies	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data		Limitation Act 1980 (Section 2)	
HR8.5	Volunteers	Secure disposal 7 years after date employment terminated	Delete 7 years after date employment terminated	Special Category Data		Limitation Act 1980 (Section 2)	

## HR10 Unison Business

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR9.1	Administration	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
HR9.2	Casework & Consultations	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
HR9.3	Policies	Retain until superseded	Retain until superseded	None		Business agreed retention period	
HR9.4	Branch Management	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
HR9.5	Committees	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
HR9.6	Membership	Retain until superseded	Retain until superseded	Personal		Business agreed retention period	

## HR11 Senior Management Area

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR9.1	HR OD Casework	Secure disposal 7 years after last employment date	Delete 7 years after last employment date	Personal		Business agreed retention period	
HR9.2	Working Area	Secure disposal 7 years after last employment date	Delete 7 years after last employment date	Special Category Data		Business agreed retention period	

## HR12 Projects and Processing

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
HR12.1	Audits	Secure disposal 6 years after date created	Delete 6 years after date created				
HR12.2	HR Initiatives	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
HR12.3	HR Initiatives - Schools	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
HR12.4	Programmes & Projects	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
HR12.5	Staff Benefit Details	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
HR12.6	Tenders	Secure disposal 6 years after date contract terminated	Delete 6 years after date contract terminated	None		Business agreed retention period	
HR12.7	Transactional Processing	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	

# Retention and Disposal Schedule

## Information and Communication Technology



## IT1 Data Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT1.1	Reporting	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Service Desk reports, Analytics, reports, User Licence reports	Business agreed retention period	Not Required
IT1.2	Data Analytics	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Reports on data usage, duplication reports, GDPR discovery reports, file size reports	Business agreed retention period	Not Required
IT1.3	Data Migration	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Migration plans, migration and sync error logs	The National Archives Best Practice	Not Required
IT1.4	Digital Data Subscribers	Securely dispose 1 year after date subscription ended	Delete 1 year after date subscription ended	Personal	Subscriber data	Retention of Communications Data under part 11: Antiterrorism, Crime and Security Act 2001. (Commissioned by SI 2003 No 3175).	Legal
IT1.5	Email Data Subscribers	Securely dispose 6 months after date subscription ended	Delete 6 months after date subscription ended	Personal	Customer alerts, SMS, email, telephony data, ISP data	Retention of Communications Data under part 11: Antiterrorism, Crime and Security Act 2001. (Commissioned by SI 2003 No 3175).	Legal

## IT2 Asset Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT2.1	Disposal	Securely dispose 2 years after date last modified	Delete 2 years after last modified	None	Disposition certificates, ICT Disposal Register	Business agreed retention period	Not Required
IT2.2	Asset Inventory	Securely dispose 2 years after date last modified	Delete 2 years after last modified	None	Inventory of hardware, Inventory of software, Store logs, Hardware Asset Register	Business agreed retention period	Not Required
IT2.3	Asset Acquisition	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Hardware acquisition forms, Software acquisition forms	Business agreed retention period	Not Required
IT2.4	Server Room	Securely dispose 6 years after last modified	Delete 6 years after last modified	Special Category Data	Server room access logs held on facilities door system	Business agreed retention period	Legal

## IT3 Knowledge Base CMDB

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT3.1	Guidance	Securely destroy 2 years after date superseded	Delete 2 years after date superseded	None	Quick reference guides, knowledge articles and software manuals	Business agreed retention period	Not Required
IT3.2	Manuals	Securely dispose after system end	Delete after system end	None	Manuals	Business agreed retention period	Not Required
IT3.3	End user training	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	None	Presentations, webinars, training materials, thirds party training materials and guidance, training logs and booking forms	Business agreed retention period	Not Required
IT3.4	Configuration Management	Keep permanently	Keep permanently	Special Category Data	Internal procedures, technical design documents, solution architecture, technical specifications	Business agreed retention period	Contract

## IT4 Change Control Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT4.1	Change Control Requests	Securely dispose current year plus 2 years	Delete 3 years after last modified	Special Category Data	Change advisory board decisions, Change advisory board minutes,	Business agreed retention period	None
IT4.2	Procedures	Securely dispose current year plus 2 years	Delete 3 years after last modified	None	Internal change procedures for configuration of infrastructure, procedures for upgrades	Business agreed retention period	Not Required
IT4.3	Change Management Decisions	Securely dispose current year plus 2 years	Delete 3 years after last modified	None	Authorisation logs, decisions logs, emails to organisation	Business agreed retention period	Not Required

## IT5 Resource Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IT5.1</b>	Technical Specifications	Securely dispose - Life of system plus 2 years. Offer to archives	Delete - life of system plus 2 years. Offer to archives	Special Category Data	Detailed technical designs, standard specifications for corporate ICT equipment, register of specifications, matrix of ICT equipment and roles	Business agreed retention period	Not Required
<b>IT5.2</b>	Testing	Securely dispose - Life of system plus 2 years	Delete - Life of system plus 2 years	None	Test plans, end user testing, known issue logs, lessons learned, work arounds, update test logs, patch testing,	Business agreed retention period	Not Required
<b>IT5.3</b>	Project Site Reviews	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Project site governance process, list of project site in use, usage reports, IG authorisation	Business agreed retention period	Not Required
<b>IT5.4</b>	STAG	Securely dispose current year plus 2 years	Delete 3 years after last modified	Special Category Data	Stag reports to determine what is feasible	Business agreed retention period	None

## IT6 Licencing, Contracts and Budgets

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT6.1	Software Licences	Securely dispose 6 years after licence agreement has expired	Delete 6 years after licence agreement has expired	Special Category Data	Software licence registers, licence agreements, emails and correspondence with suppliers, licence renewals	Copyright (Computer Programs) Regulations 1992 (SI 3233)	Legal
IT6.2	Mobile Applications	Securely dispose 6 years after licence agreement has expired	Delete 6 years after licence agreement has expired	Special Category Data	Mobile licence registers, mobile licence agreements, emails and correspondence with suppliers, licence renewals	Business agreed retention period	Contract
IT6.3	Enterprise Agreements	Securely dispose 6 years after agreement has expired	Delete 6 years after agreement has expired	Special Category Data	Enterprise agreements with third party suppliers, service level agreements, supporting documents	Limitation Act 1980 (Section 2)	Contract
IT6.4	Certificates	Securely dispose 6 years after certificate has expired	Delete 6 years after certificate has expired	Special Category Data	Software and hardware certificates	Limitation Act 1980 (Section 2)	Contract
IT6.5	Contracts	Securely dispose 6 years after contract has expired	Delete 6 years after contract has expired	Special Category Data	Software and hardware contracts and associated tender documentation for successful supplier	Limitation Act 1980 (Section 2)	Contract
IT6.6	Budgets	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
IT6.7	Third Party Access Agreements	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## IT7 Cloud Platforms

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT7.1	Software as a Service	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Plans, Actions, Reports, installation and setup plans, reports, IP addresses	The National Archives Best Practice	Not Required
IT7.2	AZURE	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Plans, installations, device IP addresses,	The National Archives Best Practice	Not Required
IT7.3	Upgrades to software	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Pre-requisites, installation plans, installation exe files	The National Archives Best Practice	Not Required
IT7.4	Office 365	Destroy after appraisal of emails after employee or Councillor has left as agreed with their manager	Delete after appraisal of emails after employee or Councillor has left as agreed with their manager	Personal	Email accounts for employees, email accounts for councillors	Business agreed retention period	Legal

## IT8 Managing Infrastructure

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT8.1	Information Security	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	PEN testing, Antivirus information, AV setup and Reports Switch security plans, firewall plans and updates, firewall reports, Key pass, codes of practice	Business agreed retention period	Legal
IT8.2	Network Maintenance	Securely dispose date of maintenance plus 6 years	Delete date of maintenance plus 6 years	Special Category Data	Network IP addresses, switch location and model plan, log ins,	Limitation Act 1980 (Section 2)	Legal
IT8.3	Identity Management	Securely dispose Termination of employment plus 6 years	Delete 6 years after termination of employment	Special Category Data	Active Directory Reports, PowerShell commands	Business agreed retention period	Legal
IT8.4	Disaster Recovery and Back-ups	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Backup of full server, file restores, logins, action plans, reports, location info	The National Archives Best Practice	Legal
IT8.5	Server Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Server Name, ip address, service logins, documentation, certificates, PowerShell commands, plans, designs,	The National Archives Best Practice	Not Required



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT8.6	Patch Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Reports, Patches, Known Issues, Resolution procedures	Business agreed retention period	Not Required
IT8.7	Storage Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Device registers, storage location info, ip addresses, logins	The National Archives Best Practice	Not Required
IT8.8	WAN Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Router, Switches and Modem Configurations, ip addresses, router logins, Wi-Fi, web filter information, telephone numbers, Service level agreements,	The National Archives Best Practice	Not Required
IT8.9	Upgrades to Infrastructure	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Designs, Meeting /White Papers, Research materials	The National Archives Best Practice	Not Required
IT8.10	Desktop Maintenance	Date of maintenance plus 6 years	Delete 6 years after date of maintenance	Special Category Data	Maintenance of hardware warranties, builds, end of life	Business agreed retention period	Not Required
IT8.11	Network Procedures	Securely dispose 2 years after date superseded	Delete 2 years after date superseded	Special Category Data	Work procedures to make changes to network	Business agreed retention period	Not Required
IT8.12	Server Procedures	Securely dispose 2 years after superseded	Delete 2 years after superseded	Special Category Data	Work procedures to make changes to servers and server farm	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT8.13	Systems Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Maintenance of SQL and Oracle Link to application systems	Business agreed retention period	Not Required
IT8.14	Systems Procedures	Securely dispose 2 years after date superseded	Delete 2 years after superseded	Special Category Data	Work procedures to make changes to systems	Business agreed retention period	Not Required
IT8.15	Desktop Procedures	Securely dispose 2 years after date superseded	Delete 2 years after superseded	Special Category Data	Work procedures to make changes to desktop	Business agreed retention period	Not Required
IT8.16	Compliance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	PSN, NHS toolkit PCIDSS	Business agreed retention period	Legal
IT8.17	Service Desk	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
IT8.18	IT Audits	Securely manually dispose 6 years after date last modified	Manually delete 6 years after date last modified	Special Category Data		Business agreed retention period	

## IT9 Managing Communication

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT9.1	Telephony	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Register of telephones, numbers, and users. Guidance and procedures	Business agreed retention period	Contract
IT9.2	Mobile Devices	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Register of telephones, numbers, and users. Guidance and procedures	Business agreed retention period	Contract
IT9.3	Landline and Broadband	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Landline and Broadband configuration and locations	Business agreed retention period	Not Required

## IT10 Strategy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT10.1	Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Action unit plans, Annual Report	Business agreed retention period	Not Required
IT10.2	Policy	Keep permanently	Keep permanently	None	ICT Policy, ICT strategy	Business agreed retention period	Not Required
IT10.3	Standards	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Security standard, Data management standards	Business agreed retention period	Not Required
IT10.4	Principles	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Architecture business ITIL	Business agreed retention period	Not Required
IT10.5	Maturity Models	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Business maturity models	Business agreed retention period	Not Required
IT10.6	Technical Strategy	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Technical direction technical standards	Business agreed retention period	Not Required
IT10.7	Resource planning (staff)	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	resource plan staff training	Business agreed retention period	Legal
IT10.8	Service planning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	work plan work requests	Business agreed retention period	Not Required

## IT11 Application Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT11.1	Supplier Management	Securely dispose 7 years after date created	Delete 7 years after date created	Personal	Supplier information, Plans, Actions, Reports	HMRC - Compliance Handbook Manual CH15400	Legal
IT11.2	List of Applications	Securely dispose - Life of application plus 3 years	Delete 3 years after date application ended	None	User access logins, Application Guidance and correspondence	Business agreed retention period	Not Required
IT11.3	Application Procedures	Securely destroy 2 years after date superseded	Delete 2 years after date superseded	Special Category Data	Work procedures to make changes to applications supported	Business agreed retention period	Not Required
IT11.4	Schools	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Capita contract, procedures, training guides, training programme, SLAs, financial recharges to schools, SIMS upgrades,	Business agreed retention period	Not Required
IT11.5	School Secure Data	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	Special Category Data	Pupil data extracts from schools for statutory returns	Business agreed retention period	Legal

## IT12 Release Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT12.1	Onboarding	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Release management handover to business as usual. Supporting documentation	Business agreed retention period	Not Required
IT12.2	End user test plans	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Test plans, feedback	Business agreed retention period	Not Required
IT12.3	Known Errors and Lessons Learned	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Issues logs, Known errors, lessons learned	Business agreed retention period	Not Required

## IT13 Service Delivery

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT13.1	Service Level Agreements	Securely dispose internal SLA 3 years and external 6 years after agreement has expired	Delete internal 3 years and external 6 years after agreement has expired	None	SLAs with business areas	Business agreed retention period	Not Required
IT13.2	Service Catalogue	Securely destroy 2 years after date superseded	Delete 2 years after date superseded	None	Services provided by IT Services	Business agreed retention period	Not Required
IT13.3	Customer Service Engagement	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	IT Surveys IT messages IT news	Business agreed retention period	Not Required
IT13.4	Users boards	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Change control boards, project boards for ongoing support for application	Business agreed retention period	Not Required
IT13.5	Serious incident review and lessons learned	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Investigations technical or personal	Business agreed retention period	Legal
IT13.6	IT Comms	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None		Business agreed retention period	

## IT14 Digital Services

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT14.1	Website Analytics	Keep permanently	Keep permanently	None	Reports, Raw Data	Business agreed retention period	Not Required
IT14.2	Communications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Social Media content, blog content	Business agreed retention period	Not Required
IT14.3	Monitoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Website audits, monitoring records, inventories	Business agreed retention period	Not Required
IT14.4	Development	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Redevelopment records, user testing, reports	Business agreed retention period	Not Required
IT14.5	Websites	Securely destroy 6 years after date superseded	Delete 6 years after date superseded	None	Website records, web content, sta	Business agreed retention period	Not Required



## IT15 Project Management Office

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IT15.1	Performance Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
IT15.2	Policies and Strategies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
IT15.3	Project	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
IT15.4	Project Templates	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

# Retention and Disposal Schedule

## Information Management

## IM1 Access to Information

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM1.1</b>	Data Protection	Securely dispose 11 years after date created	Delete 11 years after date created	Personal	Subject access requests, evidential information, responses, records of responses	Data Protection Act 2018	Legal
<b>IM1.2</b>	Environmental information	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Subject access requests, evidential information, responses, records of responses	Environmental Information Regulations 2004	Legal
<b>IM1.3</b>	Freedom of information	Securely dispose 11 years after date created	Delete 11 years after date created	None	Subject access requests, evidential information, responses, records of responses	Freedom of Information Act 2000	Not Required
<b>IM1.4</b>	General Data Protection Regulations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Legal advice, Internal Security Incident reports, ICO notifications	The General Data Protection Regulations 2018	Legal
<b>IM1.5</b>	Complaints	Securely dispose 4 years after date created	Delete 4 years after date created	Personal	SARs unresolved, escalation process to formal complaint.	Data Protection Act 2018; Freedom of Information Act 2000	Legal
<b>IM1.6</b>	Ombudsman	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Evidence for Ombudsman, Responses	Business agreed retention period	Public Task
<b>IM1.7</b>	Information Commissioner's Office	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Correspondence, audits, reports	The National Archives Best Practice	Public Task

## IM2 Archives

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM2.1</b>	Digital Preservation	Keep permanently	Keep permanently	None	Digital preservation decision, appraisals	Business agreed retention period	Not Required
<b>IM2.2</b>	National Archives	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Guidance and reference	The National Archives Best Practice	Not Required
<b>IM2.3</b>	Semi Current Records	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Records of semi current records	The National Archives Best Practice	Not Required
<b>IM2.4</b>	Paper Preservation	Keep permanently	Keep permanently	None	Paper preservation decision, appraisals	Business agreed retention period	Not Required
<b>IM2.5</b>	Local Records Centres	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Meetings, minutes, decisions	The National Archives Best Practice	Not Required

## IM3 Records Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM3.1</b>	Retention & Disposal	Retain until superseded	Retain until superseded	None	Retention and disposal schedule	Business agreed retention period	Not Required
<b>IM3.2</b>	Compliance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Legislation guidance	The National Archives Best Practice	Not Required
<b>IM3.3</b>	Procedures	Retain until superseded	Retain until superseded	None	Procedures guidance	Business agreed retention period	Not Required
<b>IM3.4</b>	Publications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Records and publication scheme	The National Archives Best Practice	Not Required
<b>IM3.5</b>	Disposition Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Disposal schedules	The National Archives Best Practice	Not Required
<b>IM3.6</b>	Corporate File Plan	Retain until superseded	Retain until superseded	None	Corporate file plan	Business agreed retention period	Not Required
<b>IM3.7</b>	Data Migration	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Migration plans, logs, reports	The National Archives Best Practice	Not Required
<b>IM3.8</b>	Image Capture	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Images, photographic ID evidence for SARS and Information Rights,	The National Archives Best Practice	Not Required
<b>IM3.9</b>	Supplier Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Supplier details	The National Archives Best Practice	Not Required

## IM4 Publication Scheme

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM4.1</b>	ICO Model Publication Scheme	Retain until superseded	Retain until superseded	None	Scheme guidance - public sector model from ICO	Business agreed retention period	Not Required
<b>IM4.2</b>	Published Records	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information held which has been published	The National Archives Best Practice	Not Required

## IM5 Information Asset Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM5.1</b>	Information Asset Management	Retain until superseded	Retain until superseded	None	Information asset registers	Business agreed retention period	Not Required
<b>IM5.2</b>	Data Protection Impact Assessments	Retain until superseded	Retain until superseded	None	Completed Summary Data Protection Impact Assessments and full Data Protection Impact Assessments	Business agreed retention period	Not Required
<b>IM5.3</b>	Incident and Data Breaches	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>IM5.4</b>	Information Management Strategy	Retain until superseded	Retain until superseded	None		Business agreed retention period	

## IM6 Evidence Information Access Requests

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM6.1</b>	Adult Care Services	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.2</b>	Children and Families Services	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.3</b>	Communications	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.4</b>	Community and Libraries	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.5</b>	Community Safety and Emergencies	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.6</b>	Crematoria and Cemeteries	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.7</b>	Customer Services	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.8</b>	Democracy	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.9</b>	Economy and Regeneration	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM6.10</b>	Education	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.11</b>	Finance	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.12</b>	Forestcare	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.13</b>	Health and Safety	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.14</b>	Human Resources	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.15</b>	ICT	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.16</b>	Information Management	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.17</b>	Insurance and Risk Management	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.18</b>	Internal Audit	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.19</b>	Leadership	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM6.20</b>	Legal Services	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.21</b>	Parks and Countryside	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.22</b>	Planning and Building Control	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.23</b>	Procurement	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.24</b>	Property	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.25</b>	Public Health	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.26</b>	Registration Services	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.27</b>	Transport	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.28</b>	Waste	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal
<b>IM6.29</b>	Public Protection Partnership	Securely dispose 3 years after request complied with	Delete 3 years after request completed	Personal	Evidential information	Freedom of Information Act 2000	Legal

## IM7 Groups and Forums

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IM7.1</b>	Groups	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes of User Groups	Limitation Act 1980 (Section 2)	Not Required
<b>IM7.2</b>	Forums	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes of Forums	Limitation Act 1980 (Section 2)	Not Required
<b>IM7.3</b>	Information Governance Leads	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>IM7.4</b>	Information Management Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

# Retention and Disposal Schedule

## Insurance and Risk Management

## IN1 Insurance Processing Claims

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN1.1</b>	Open Claims	Retain until claim closed then transfer to Closed Claims.	Retain until claim closed then transfer to Closed Claims.	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Limitation Act 1980 (Section 2)	Contract
<b>IN1.2</b>	Closed Claims	Keep permanently	Keep permanently	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Business agreed retention period.	Contract
<b>IN1.3</b>	Claims for Minors	Keep permanently	Keep permanently	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Business agreed retention period.	Contract
<b>IN1.4</b>	Asbestos and Abuse Claims	Retain until claim closed then transfer to Closed Claims.	Retain until claim closed then transfer to Closed Claims.	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Business agreed retention period	Contract
<b>IN1.5</b>	Incidents and referrals	Securely dispose 25 years after date record closed	Delete 25 years after date record closed	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Business agreed retention period	Legal
<b>IN1.6</b>	Closed Liability Claims	Keep permanently	Keep permanently	Special Category Data	Case files to include Medical reports, Witness statements, Claim forms, bank details, Court documents, investigations	Business agreed retention period	Legal

## IN2 Claims Reports

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN2.1</b>	Reports	Keep permanently	Keep permanently	Personal	Claimant name, address, accident date, location, nature of damage/injury, payment information	Business agreed retention period	Legal
<b>IN2.2</b>	Stop Loss Monitoring	Keep permanently	Keep permanently	Personal	Claimant name, address, accident date, location, nature of damage/injury, payment information	Business agreed retention period	Legal
<b>IN2.3</b>	Imprest Accounts	Securely dispose 10 years after date last claim record closed	Delete 10 years after date last claim record closed	Personal	Claimant name, accident date, payment details	Business agreed retention period	Legal
<b>IN2.4</b>	Freedom of Information Requests	Secure disposal 3 years after enquiry made	Delete 3 years after date created	Personal	Claimant name, address, accident date, location, nature of damage/injury, payment information	Business agreed retention period	Legal

## IN3 Insurance Renewals

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN3.1</b>	Renewals and re-tendering	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	Personal	Reports from insurers/brokers, insurance premium information, tendering reports, evaluation, minutes of meetings, premium invoices. Copies of signed contract documents	Business agreed retention period	Contract
<b>IN3.2</b>	Schedules and Policies	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	None	Insurance schedules, policy wordings, premium invoices	Business agreed retention period.	Not Required
<b>IN3.3</b>	PL and Other Liability Schedules and Policies	Keep permanently	Keep permanently	None	Insurance schedules, policy wordings, premium invoices	Business agreed retention period.	Not Required
<b>IN3.4</b>	Employers Liability Certificates	Securely dispose 40 years after policy expires	Delete 40 years after policy expires	None	Employers liability certificates	Employers Liability (Compulsory Insurance) Regulations 1998 (5/1-2)	Not Required
<b>IN3.5</b>	Insurers and Brokers	Securely dispose 10 years after contract expiry	Delete 10 years after contract expiry	None	Minutes of meetings, reports from brokers, broker fee invoices, tendering and contract renewal reports. Correspondence with insurers and brokers.	Business agreed retention period	Not Required

## IN4 Insurance Classes

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN4.1</b>	Property	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	Personal	Lists of properties and values, details of security of buildings, lease agreements, lease renewal documentation, premium information. Correspondence with insurers and brokers	Business agreed retention period	Contract
<b>IN4.2</b>	Liability	Keep permanently	Keep permanently	Special Category Data	Medical information, personal employee and client information, policy schedules, policy wordings, premium information. Correspondence with insurers and brokers.	Business agreed retention period	Legal
<b>IN4.3</b>	Motor	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	None	Vehicle details, values, policy schedules, policy wordings, premium information	Business agreed retention period	Not Required
<b>IN4.4</b>	Engineering	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	None	Inspection location information, machinery, plant, lift and other equipment information location and inspection reports. Policy schedules, policy wordings, correspondence with insurers and brokers, premium information	Business agreed retention period	Not Required



Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN4.5</b>	Schools	Securely dispose 10 years after contract expiry	Delete 10 years after contract expiry	Personal	Lists of properties and values, premium information, policy schedules and wordings. Premium calculation information. Correspondence with schools, insurers and brokers	Business agreed retention period	Contract
<b>IN4.6</b>	Consortium Schools	Keep permanently	Keep permanently	Personal	Information on schools structure, building methods, insurers site reports	Business agreed retention period	Contract
<b>IN4.7</b>	Supply	Retain while this scheme remains active	Retain while this scheme remains active	Special Category Data	Lists of schools, premium information, details of claims including medical information, sick notes, details of absence, claim payments. Insurance schedules and policy wordings	Business agreed retention period	Contract
<b>IN4.8</b>	Downshire Homes	Securely dispose 10 years after policy expires	Delete 10 years after policy expires	Personal	Lists of properties and values, premium information, policy schedules and wordings. Premium calculation information. Correspondence with insurers and brokers. Reports from insurers/brokers, insurance premium information, tendering reports, evaluation, minutes of meetings, premium invoices	Business agreed retention period.	Contract
<b>IN4.9</b>	Historic Insurance Policies	Keep permanently	Keep permanently	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN4.10</b>	Loss Control Surveys	Keep permanently	Keep permanently	None		Business agreed retention period	

## IN5 Claims Software

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN5.1</b>	Contract Renewals and Retendering	Securely dispose last action on contract plus 3 years	Delete 3 years after date contract expires	Personal	Tendering reports, evaluation, minutes of meetings, contract invoices. Award reports, contract documents.	Limitation Act 1980 (Section 8)	Contract
<b>IN5.2</b>	Upgrades	Securely dispose last action on contract plus 3 years	Delete 3 years after date contract expires	Personal	Testing data, claimant names and addresses. Correspondence with software provider. Log in username and passwords	Business agreed retention period	Contract

## IN6 Guidance and Policy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN6.1</b>	Insurance Manual	Securely dispose 10 years after date superseded	Delete 10 years after date superseded	None	Current and historic versions of manual.	Business agreed retention period	Not Required

## IN7 Insurance Forums

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IN7.1	Berkshire Insurance Officers Group	Securely dispose 3 years after date of meeting	Delete 3 years after date last modified	None	Minutes of meetings, correspondence with members	Business agreed retention period	Not Required

## IN8 Risk Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IN8.1	Strategic Risk Register	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Quarterly versions of the Strategic Risk Register and supporting documentation	Business agreed retention period	Not Required
IN8.2	Departmental Risk Registers	Securely dispose 6 years after last modified	Delete 6 years after date last modified	Special Category Data	Quarterly versions of the Departmental Risk Registers and supporting documentation	Business agreed retention period	Not Required
IN8.3	Reporting	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports on risk management to Strategic Risk Management Group, Corporate Management Team, Department Management Teams and Governance and Audit Committee	The National Archives Best Practice	Not Required
IN8.4	Strategic Risk Management Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Agendas, minutes	The National Archives Best Practice	Not Required
IN8.5	Strategy and Toolkit	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Drafts and final of Risk Management Strategy and Risk Management Toolkit	The National Archives Best Practice	Not Required
IN8.6	Other risk registers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Other risk registers as required e.g. transformation, town centre	Business agreed retention period	Not Required
IN8.7	Risk Management Guidance	Securely dispose 10 years after date superseded	Delete 10 years after date superseded	None	National Central Government Guidance, ALARM documents.	Business agreed retention period	Not Required

## IN9 Team

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IN9.1</b>	Team Meetings	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Agendas and action lists for team meetings	Business agreed retention period	Not Required
<b>IN9.2</b>	Other team Information	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Team information e.g. working dates for Christmas, team contact details, team business continuity plans	Business agreed retention period	Not Required

# Retention and Disposal Schedule

## Internal Audit



## IA1 Audit Planning

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA1.1</b>	Audit Planning	Keep permanently	Keep permanently	None	Cyclical Plan, assurance mapping	Business agreed retention period	Not Required
<b>IA1.2</b>	Audit Planning by Year	Keep permanently	Keep permanently	None	Annual Detailed Plans, Terms of Reference, planning notes for providers, school self-assessments and evaluation of these	Business agreed retention period	Not Required

## IA2 Audit Working Papers

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA2.1</b>	Audit Working Papers	Keep permanently	Keep permanently	Special Category Data	Blank test programmes	Business agreed retention period	Public Task
<b>IA2.2</b>	Audit Working Papers by Year	Securely dispose 6 years after date of completion	Delete 6 years after date last modified	Special Category Data	Test programmes, testing schedules, supporting evidence, review of individual audits	Business agreed retention period	Public Task
<b>IA2.3</b>	Other Investigations	Keep permanently	Keep permanently	Special Category Data		Business agreed retention period	Public Task

## IA3 Draft Audit Reports

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IA3.1	Draft Audit Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Draft Reports	Business agreed retention period	Not Required

## IA4 Final Audit Reports

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IA4.1	Final Audit Reports	Keep permanently	Keep permanently	None	Final Reports	Business agreed retention period	Not Required

## IA5 Monitoring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA5.1</b>	Progress Records	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Contract monitoring schedules, provider quarterly monitoring reports, agendas and minutes of contract monitoring meetings, client questionnaires. minutes of meetings with chief executive, team meetings	Business agreed retention period.	Public Task
<b>IA5.2</b>	File Index	Keep permanently	Keep permanently	None	Records of Audit reference numbers	Business agreed retention period.	Not Required

## IA6 Background

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA6.2</b>	Information for audits	Keep permanently	Keep permanently	None	Research, evidence, national guidance and compliance	Business agreed retention period	Not Required
<b>IA6.3</b>	Corporate Reporting	Keep permanently	Keep permanently	None	Reporting to CMT draft and final versions	Business agreed retention period	Not Required

## IA7 Counter-Fraud

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IA7.1	National Fraud Initiative	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	National Guidance and reference, emails	Business agreed retention period.	Legitimate Interest
IA7.2	Investigations	Keep permanently	Keep permanently	Special Category Data	Investigation reports, Investigation evidence, interview notes, data analysis and reports, monitoring of Counter Fraud provider, business case for counter fraud	Business agreed retention period	Legitimate Interest
IA7.3	Fraud Log and Fraud Surveys	Keep permanently	Keep permanently	Special Category Data	Records of irregularities, completion of annual fraud survey,	HMRC - Compliance Handbook Manual CH15400	Legitimate Interest
IA7.4	Counter-Fraud Policies	Keep permanently	Keep permanently	None	Policy documents	Business agreed retention period	Not Required
IA7.5	Fraud alerts and bulletins received	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Alerts form NAFN (MN to look up)	Business agreed retention period	Legitimate Interest
IA7.6	Fraud alerts and bulletins issued	Keep permanently	Keep permanently	None	Alerts and bulletins for employees	Business agreed retention period	Not Required
IA7.7	Examples from other authorities	Keep permanently	Keep permanently	Special Category Data	Good practice records from other local authorities	Business agreed retention period	None
IA7.8	RBC & Other Fraud Arrangements	Keep permanently	Keep permanently	Special Category Data		Limitation Act 1980	
IA7.9	Training	Keep permanently	Keep permanently	None		Business agreed retention period	

## IA8 Audit Forums

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA8.1</b>	Berkshire Audit Forum	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Agendas, minutes, shared best practice	Business agreed retention period	Not Required
<b>IA8.2</b>	Home Counties Internal Audit Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Agendas, minutes, shared best practice	Business agreed retention period	Not Required
<b>IA8.3</b>	London Audit Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Agendas, minutes, shared best practice	Business agreed retention period	Not Required



## IA9 Governance and Assurance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA9.1</b>	IMG/Annual Governance Statement	Securely dispose 3 years after date last modified	Delete 3 years after last modified	None	Draft Statements	Business agreed retention period	Not Required
<b>IA9.2</b>	Audit Committee Reporting	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Draft and final versions of reports for Audit Committee	The National Archives Best Practice	Not Required
<b>IA9.3</b>	Annual Head of Internal Audit Opinion Reports	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Draft and final reports	Business agreed retention period	Not Required
<b>IA9.4</b>	Interim Head of Internal Audit Opinion Reports	Securely dispose 6 years after date last modified	Delete 6 years after last modified	None	Draft and final versions of reports	Business agreed retention period	Not Required

## IA10 Guidance and Policy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>IA10.1</b>	Internal Audit Charter	Keep permanently	Keep permanently	None	Internal Audit Charter in draft and final	Business agreed retention period	Not Required
<b>IA10.2</b>	Training and Communication	Keep permanently	Keep permanently	None	PowerPoint training presentations, training materials	Business agreed retention period	Not Required
<b>IA10.3</b>	Procedures and guidance	Keep permanently	Keep permanently	None	Guidance for auditees, National audit guidance, examples of good practice from other authorities, internal procedures and guidance	Business agreed retention period	Not Required
<b>IA10.4</b>	Schools	Keep permanently	Keep permanently	None	Test programme for schools, Guidance provided to all schools. Correspondence with schools, emails to schools on advice, audit visits, themed audits issuing, schools self-assessment questionnaire guidance.	Business agreed retention period	Not Required
<b>IA10.5</b>	CIPFA Matrices	Keep permanently	Keep permanently	None	Copies of the CIPFA testing matrices that we have purchased	Business agreed retention period	Not Required
<b>IA10.6</b>	Public Sector Internal Audit Standard	Keep permanently	Keep permanently	Personal	Published mandatory standards, internal evaluation of compliance, external independent assessments, CPD records for SH and MW, related party forms for SH and MW,	Business agreed retention period	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
					ethical compliance for SH and ME		
<b>IA10.7</b>	Advice	Keep permanently	Keep permanently	None	Copies of emails and correspondence providing advice	Business agreed retention period	Not Required
<b>IA10.8</b>	Internal Audit Manual	Keep permanently	Keep permanently	None	Elements of the Internal Audit Manual	Business agreed retention period	Not Required
<b>IA10.9</b>	Gifts and Hospitality	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Copies of reminders, emails on gifts and hospitality	Limitation Act 1980 (Section 2)	Not Required
<b>IA10.10</b>	Legal Opinions on Access	Keep permanently	Keep permanently	None	Legal advice on audit access	Business agreed retention period	Not Required
<b>IA10.11</b>	Legislation	Keep permanently	Keep permanently	None	Accounts and Audit Regulations	Business agreed retention period	Not Required

## IA11 Contracting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
IA11.1	Tendering	Securely dispose 6 years after date contract ended	Delete 6 years after date contract ended	Special Category Data	Specification, Procurement plans, Tender evaluations, references	Limitation Act 1980	Contract
IA11.2	Main contract	Keep permanently	Keep permanently	Special Category Data	Legal agreements with main provider, Apex meetings	Limitation Act 1980 (Section 8)	Contract
IA11.3	IT contract	Keep permanently	Keep permanently	Special Category Data	Legal agreements with IT audit provider	Limitation Act 1980 (Section 8)	Contract
IA11.4	S113 Agreement	Keep permanently	Keep permanently	Special Category Data	Legal agreements with Reading and WBC	Limitation Act 1980 (Section 2)	Contract

# Retention and Disposal Schedule

## Leadership

## LE1 Quality and Performance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE1.1	Assessments	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Assessments of quality, efficiency or performance of the authority, service or unit	The National Archives Best Practice	Not Required
LE1.2	Inspections	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Inspection records	The National Archives Best Practice	Not Required
LE1.3	Monitoring	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Monitoring or reviewing the quality, efficiency, or performance of a local authority service or unit	Business agreed retention period	Not Required
LE1.4	Performance	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	QSRs (quarterly service reports), CPOR (council plan overview report), performance definitions, timetables, other performance reports, dashboards	Business agreed retention period	Not Required
LE1.5	Process Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Guidance, procedures, improvements	The National Archives Best Practice	Not Required
LE1.6	Analytics	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Statistics, analysis, reports (ad hoc), dashboards	Business agreed retention period	Public task

## LE2 Corporate Performance Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE2.1	Departmental Returns	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports & returns, statistical data	Business agreed retention period	Not Required
LE2.2	Reports for Government	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Reports & returns, statistical data	Business agreed retention period	Not Required
LE2.3	Service Plans	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
LE2.4	Performance Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
LE2.5	Data Analysis	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## LE3 Business Intelligence

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE3.1	Inspections and Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Performance reports, Data analytic reports, requests for information	Business agreed retention period	Public task
LE3.2	Departmental Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Strategic reports, Departmental evidence	Business agreed retention period	Public task
LE3.3	Data Collections	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Children in Need Census, 903 return, Fostering Data sets, ASGLB, Safeguarding Adults collection, SALT, DOLS, SSDA 902, Survey of Adult Carers in England, Adult user surveys, OFSTED,	Business agreed retention period	Public task
LE3.4	Requests	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Request for evidence and statistics,	The National Archives Best Practice	Public task
LE3.5	Corporate Performance Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	



## LE4 Consultations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE4.1	Statutory	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Surveys and results	Business agreed retention period	Not Required
LE4.2	Departmental	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Surveys and results	Business agreed retention period	Not Required

## LE5 Meetings

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE5.1	Executive Meetings	Keep permanently	Keep permanently	None	Minutes, agendas, decisions, presentations, formal/informal	Business agreed retention period	Not Required
LE5.2	People Directorate	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, decisions, presentations, formal/informal	Limitation Act 1980 (Section 2)	Not Required
LE5.3	Place, Planning & Regeneration Directorate	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, decisions, presentations, formal/informal	Limitation Act 1980 (Section 2)	Not Required
LE5.4	Delivery Directorate	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, decisions, presentations, formal/informal	Limitation Act 1980 (Section 2)	Not Required
LE5.5	Resources Directorate	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, decisions, presentations, formal/informal	Limitation Act 1980 (Section 2)	Not Required
LE5.6	Chief Executive's Office	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Minutes, agendas, decisions, presentations, formal/informal	Limitation Act 1980 (Section 2)	Not Required

## LE6 Complaints and Compliments

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE6.1	Pre-2021 Complaints Archive	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Correspondence, Email, investigative Reports,	Business agreed retention period	Public task
LE6.5	Guidance	Securely dispose 5 years after date superseded	Delete 5 years after date superseded	None	Processes, Guidance, Procedures	Business agreed retention period	Not Required
LE6.6	Compliments	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	None	Correspondence	Business agreed retention period	Not Required
LE6.7	Business Complaints	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Correspondence with complainants.	Business agreed retention period	Public task
LE6.8	MP Enquiries	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Retention Guidelines for Local Authorities	
LE6.9	MP Enquiries pre August 2020	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Retention Guidelines for Local Authorities	
LE6.10	Complaints Trackers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
LE6.11	Complaints	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal		Business agreed retention period	

## LE7 Organisational Structure

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE7.1	Structure	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Organisational Structure Charts	Business agreed retention period	Not Required
LE7.2	Re-structure	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports, Minutes, Actions, HR Guidance and Compliance	Business agreed retention period	Not Required

## LE8 Hospitality

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE8.1	Gifts and Hospitality	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Registers	Limitation Act 1980 (Section 2)	Not Required

## LE9 Letters/Correspondence

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE9.1	Template Records	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Corporate templates	Business agreed retention period	Not Required

## LE10 Communications and Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE10.1	Presentations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Corporate presentations, Leadership presentations, Departmental Presentations	The National Archives Best Practice	Not Required

## LE11 Policy and Strategy Projects

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LE11.1	Brexit	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal		Business agreed retention period	
LE11.2	Core Strategy Documents	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
LE11.3	Council Plan	Retain until superseded	Retain until superseded	None		Business agreed retention period	



# Retention and Disposal Schedule

## Legal

## LS1 Land Registration

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LS1.1	Common Land	Keep permanently	Keep permanently	Personal	Register of Common Land	Commons Registration Act 1965	Legal
LS1.2	Conveyancing	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Letters, emails, attendance notes, memos, reports on title, advice notices. Work flow lists. Deeds. Legal transactions	Business agreed retention period	Legal
LS1.3	Deeds	Keep permanently	Keep permanently	Personal	Spreadsheets, letters, emails, attendance notes. Deeds	Limitation Act 1980 (Section 2)	Legal
LS1.4	Land Charges	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Personal	Case files relating to Legal Charges	Limitation Act 1980 (Section 2)	Legal
LS1.5	Land Compensation Claims	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Personal	Case files relating to Part 1 Land Compensation Act 1973 Payments	Limitation Act 1980 (Section 2)	Legal
LS1.6	Leases and Mortgages	Securely dispose 6 years after end of lease/mortgage	Delete 6 years after date ended	Personal	Spreadsheets, letters, emails, agreements, attendance notes. Deeds	Limitation Act 1980 (Section 2)	Legal
LS1.7	Recovery of Land	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Spreadsheets, letters, emails, attendance notes, Iken database. Deeds	Limitation Act 1980 (Section 8)	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>LS1.8</b>	Sale of Property	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Spreadsheets, letters, emails, attendance notes, reports on title. Deeds	Limitation Act 1980 (Section 2)	Legal
<b>LS1.9</b>	Searches	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	Personal	Council wide.	Business agreed retention period	Legal
<b>LS1.10</b>	Personal Searches	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	Personal	Searches carried out by Land Charges service	Business agreed retention period	Legal
<b>LS1.11</b>	Reporting	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Letters, emails, reports	Business agreed retention period	Legal

## LS2 Litigation

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LS2.1	Precedent Case Law	Securely dispose 6 years after date case closed	Delete 6 years after date last modified	None	Lexis Nexis	Limitation Act 1980 (Section 2)	Not Required
LS2.2	Criminal Prosecutions	Securely dispose 3 years after case closed	Delete 3 years after date case closed	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	Business agreed retention period	Legal
LS2.3	Civil	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	The National Archives Best Practice	Legal
LS2.3	Licensing	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Iken, spreadsheets, letters, emails, attendance notes, Iken database	The National Archives Best Practice	Legal
LS2.4	Commercial	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	The National Archives Best Practice	Legal
LS2.5	Compensation Claims	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	The National Archives Best Practice	Legal
LS2.6	Debt Recovery	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	Limitation Act 1980 (Section 2)	Legal

## LS3 Legal Agreements

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>LS3.1</b>	Sealed Contracts	Securely dispose 12 years after expiry of contract	Delete 12 years after date contract ended	Personal	Letters, emails, agreements, attendance notes,	Limitation Act 1980	Legal
<b>LS3.2</b>	Contracts not under seal	Securely dispose 6 years after expiry of contract	Delete 6 years after date contract ended	Personal	Letters, emails, agreements, attendance notes,	Limitation Act 1980 (Section 2)	Legal
<b>LS3.3</b>	Property transfers under deed	Keep permanently	Keep permanently	Personal	Letters, emails, agreements, attendance notes,	Limitation Act 1980 (Section 2)	Legal
<b>LS3.4</b>	Copyright Licencing	Securely dispose 3 years after date license expired	Delete 3 years after date license ended	Personal	Emails, letters, attendance notes	Copyright, Designs and Patents Act 1988	Legal

## LS4 Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>LS4.1</b>	Forums and Groups	Securely dispose 7 years after membership end	Delete 7 years after date membership ended	Personal	Minutes, attendance notes	Business agreed retention period	Legal
<b>LS4.2</b>	Procedures	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Emails, paper records attendance notes	Limitation Act 1980 (Section 2)	Not Required
<b>LS4.3</b>	Guidance	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None	Emails, paper records for filing in Iken	Limitation Act 1980 (Section 2)	Not Required
<b>LS4.4</b>	Supplier Engagement	Securely dispose 6 years after expiry of contract	Delete 6 years after date contract ended	Personal	Emails, letters, attendance notes, paper records for filing in Iken, agreements	Business agreed retention period	Legal

## LS5 Statutory

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>LS5.1</b>	Legislation	Keep permanently	Keep permanently	None	Lexis Nexis	Business agreed retention period	Not Required
<b>LS5.2</b>	Regulations	Retain until superseded	Retain until superseded	None	Lexis Nexis	Business agreed retention period	Not Required
<b>LS5.3</b>	Existing Bye-laws	Securely dispose 6 years after expiration	Delete 6 years after date bylaw expires	None	Paper record	Business agreed retention period	Not Required
<b>LS5.4</b>	New Bye-laws	Securely dispose 6 years after expiration	Delete 6 years after date bylaw expires	None	Paper record	Business agreed retention period	Not Required

## LS6 Enforcement Prosecution

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LS6.1	Enforcement	Securely dispose 6 years after case closed	Delete 6 years after date case closed	Personal	Spreadsheets, letters, emails, attendance notes, Iken database	Limitation Act 1980 (Section 2)	Legal



## LS7 Legal Advice

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LS7.1	Internal Advice	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Emails, letters, attendance notes.	Business agreed retention period	Legal

# Retention and Disposal Schedule

## Leisure and Culture

## LC1 Sports Centres

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LC1.1	Bracknell Leisure Centre	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None		Business agreed retention period	
LC1.2	Coral Reef	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None		Business agreed retention period	
LC1.3	Downshire GC	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None		Business agreed retention period	
LC1.4	Everyone Active	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None		Business agreed retention period	
LC1.5	Harmanswater Leisure Centre	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None		Business agreed retention period	

## LC2 Leisure Promotion

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
LC2.1	Events	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal		Business agreed retention period	

# Retention and Disposal Schedule

## **Parks and Countryside**

## PC1 Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC1.1	Legislation	Retain until superseded	Retain until superseded	None			
PC1.2	Strategy	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None			
PC1.3	Policy	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None			
PC1.4	Procedure	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None			
PC1.5	Reports	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Personal			
PC1.6	Plans	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None			
PC1.7	Data	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	Personal			
PC1.8	Library	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Personal			

## PC2 Sites

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC2.1	Parks and Countryside	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC2.2	Natural Estate	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC2.3	Heritage	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC2.4	Private land	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			

## PC3 Biodiversity

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC3.1	Trees	Keep permanently	Keep permanently	Personal		Business agreed retention period	
PC3.2	Wildlife	Keep permanently	Keep permanently	Personal		Business agreed retention period	
PC3.3	Surveys	Keep permanently	Keep permanently	None		Business agreed retention period	
PC3.4	Habitats	Keep permanently	Keep permanently	None		Business agreed retention period	
PC3.5	Sustainability	Keep permanently	Keep permanently	None		Business agreed retention period	
PC3.6	Designated Sites	Keep permanently	Keep permanently	Personal		Business agreed retention period	



## PC4 Rights of Way

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC4.1	Enforcement	Keep permanently	Keep permanently	Personal		Business agreed retention period	
PC4.2	Maps	Keep permanently	Keep permanently	None		Business agreed retention period	
PC4.3	Maintenance	Securely dispose 7 years after date created	Delete 7 years after date created	Personal			
PC4.4	Orders	Securely dispose 7 years after date created	Delete 7 years after date created	None			
PC4.5	Searches	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			

## PC5 Inspections

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC5.1	Trees	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Personal			
PC5.2	Play equipment	Securely dispose 21 years and 9 months after date created	Delete 21 years and 9 months after date created	None			
PC5.3	Vehicles and tools	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None			
PC5.4	Site properties	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC5.5	External	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None			

## PC6 Works

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC6.1	Contracted	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC6.2	In-house	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None			
PC6.3	Major Schemes	Securely dispose 12 years after end of agreement	Delete 12 years after end of agreement	None			

## PC7 Planning

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC7.1	Specialist Advice	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal			
PC7.2	Protected Trees	Retain until order revoked	Retain until order revoked	Personal			
PC7.3	Conservation Areas	Retain until area revoked	Retain until area revoked	Personal			
PC7.4	Public enquiries	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			

## PC8 New Land

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC8.1	SANGs	Securely dispose 12 years after agreement end	Delete 12 years after agreement end	Personal			
PC8.2	Public Open Space	Securely dispose 12 years after agreement end	Delete 12 years after agreement end	Personal			
PC8.3	Grants	Securely dispose 6 years after last action on grant	Delete 6 years after last action on grant	Personal			

## PC9 Partnership

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC9.1	Parish and Town	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC9.2	Volunteers	Securely dispose 4 years after date last modified	Delete 4 years after date last modified	Personal			
PC9.3	Organisations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC9.4	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC9.5	Events	Securely dispose 4 years after date last modified	Delete 4 years after date last modified				

## PC10 Comms

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC10.1	Campaigns	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC10.2	Responses	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC10.3	Images	Securely dispose 6 years after date last modified	Delete 6 years after date last modified				
PC10.4	Consultations	Keep permanently and offer to archives	Keep permanently and offer to archives	Personal			

## PC11 Estate Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC11.1	Unauthorised use	Securely dispose 6 years after date last modified	Delete 6 years after date last modified				
PC11.2	Leases	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC11.3	Licences	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC11.4	Land sales	Securely dispose 6 years after case closed	Delete 6 years after case closed	Personal			
PC11.5	Filming	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC11.6	Insurance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified				
PC11.7	Ownership	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			



## PC12 Facilities

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC12.1	Pitches and courts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC12.2	Play	Securely dispose 21 years and 9 months after date last modified	Delete 21 years and 9 months after date created	None			
PC12.3	Buildings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal			
PC12.4	Hire agreements	Securely dispose 6 years after equipment last used	Delete 6 years after equipment last used	Personal			

## PC13 The Look Out

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC16.1	Exhibition	Retain until superseded	Retain until superseded	None		Business agreed retention period	
PC16.2	Coffee Shop	Retain until superseded	Retain until superseded	None		Business agreed retention period	
PC16.3	Gift Shop	Retain until superseded	Retain until superseded	None		Business agreed retention period	
PC16.4	Bookings	Retain no longer than necessary	Retain no longer than necessary	Special Category Data		Business agreed retention period	
PC16.5	Procedures & Training	Retain until superseded	Retain until superseded	None		Business agreed retention period	
PC16.6	Outdoor areas	Retain until superseded	Retain until superseded	None		Business agreed retention period	
PC16.7	Marketing	Retain no longer than necessary	Retain no longer than necessary	Special Category Data		Business agreed retention period	
PC16.8	Reception	Retain until superseded	Retain until superseded			Business agreed retention period	
PC16.9	Management	Retain until superseded	Retain until superseded	None		Business agreed retention period	

# Retention and Disposal Schedule

## **Planning and Building Control**

## PB1 Building Control

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB1.1</b>	Building Site Inspections	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Inspections, reports, environmental data	Business agreed retention period	Not Required
<b>PB1.2</b>	Scaffold and Hoarding Licenses	Securely dispose 6 years after date license expired	Delete 6 years after date license ended	Personal	Applications for licences, public indemnity insurance of application, plans	Highways Act 1980	Legal
<b>PB1.3</b>	Demolishing a Building	Securely dispose 6 years after building demolished	Delete 6 years after date building demolished	Personal	Applicants details, site inspections, plans	Business agreed retention period	Legal
<b>PB1.4</b>	Building Control Applications	Keep permanently	Keep permanently	Special Category Data	Applications for licences, plans, occasional medical records, complaints	Building Act 1984	Legal
<b>PB1.5</b>	Building Control Enforcements	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Special Category Data	Building Act enforcement notices, evidence for court cases	Business agreed retention period	Legal
<b>PB1.6</b>	Technical Library	Keep permanently	Keep permanently	Not required	British Standards, approved documents and reference materials	Business agreed retention period	Not Required
<b>PB1.7</b>	Dangerous Structures	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Inspection notices, owner contact details	The National Archives Best Practice	Public Task
<b>PB1.8</b>	Technical Support	Keep permanently	Keep permanently	None		Business agreed retention period	

## PB2 Planning Applications

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB2.1</b>	Development Management Procedures	Retain until superseded by new policy	Retain until superseded by new policy	None		Business agreed retention period	
<b>PB2.2</b>	Planning Advice and Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Limitation Act 1980 (Section 2)	
<b>PB2.3</b>	Mapping	Keep permanently	Keep permanently	None	Maps and site plans	Business agreed retention period	Not Required
<b>PB2.4</b>	Guidance	Retain until superseded	Retain until superseded	None	Guidance and procedures	Business agreed retention period	Not Required
<b>PB2.5</b>	Planning Appeals	Keep permanently	Keep permanently	Personal		Town & Country Planning Act 1990	
<b>PB2.6</b>	Planning Applications	Keep permanently	Keep permanently	Personal		Town & Country Planning Act 1990	
<b>PB2.7</b>	Planning Committee	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	
<b>PB2.8</b>	Statistics	Securely dispose 10 years after date last modified	Delete 10 after date last modified	None		Business agreed retention policy	
<b>PB2.9</b>	Training	Retain until superseded by new policy	Retain until superseded by new policy	None		Business agreed retention period	

## PB3 Planning Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB3.1</b>	Covenant Controls	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	None	Local Government Covenants and correspondence	Limitation Act 1980 (Section 11)	Not Required
<b>PB3.2</b>	Procedures and Legislation	Keep permanently	Keep permanently	None	Planning Act legislation and guidance	Business agreed retention period	Not Required
<b>PB3.3</b>	Planning Enforcement	Keep permanently	Keep permanently	Special Category Data	Planning Act enforcement notice, evidence for court cases. Held in Idox	Town & Country Planning Act 1990	Legal
<b>PB3.4</b>	IDOX	Securely dispose 1 year after date last modified	Delete 1 year after date last modified	Special Category Data		Limitation Act 1980 (Section 11)	

## PB4 Planning Policy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB4.1</b>	Conservation Areas	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>PB4.2</b>	Housing Development	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>PB4.3</b>	Local Plan	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>PB4.4</b>	National Planning Guidance	Securely dispose 6 years after date superseded	Delete 6 years after date superseded	None		Business agreed retention period	
<b>PB4.5</b>	Natural Environment	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>PB4.6</b>	Local Development Scheme	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>PB4.7</b>	Duty to co-op	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>PB4.8</b>	Sustainable Development	Retain until superseded	Retain until superseded	None		Business agreed retention period	
<b>PB4.9</b>	Supplementary Planning Documents	Retain until superseded	Retain until superseded	Personal	Research data, consultation responses, Statement of consultations	Business agreed retention period	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB4.10</b>	Neighbourhood Planning	Retain until superseded	Retain until superseded	Personal	Neighbourhood plans produced by Town and Parish Councils, responses and actions	Business agreed retention period	Legal
<b>PB4.11</b>	Section 106 Agreements	Keep permanently	Keep permanently	Personal	Legal Agreements	Business agreed retention period	Legal
<b>PB4.12</b>	Urban Design	Retain until superseded	Retain until superseded	None	Policy and strategy	Business agreed retention period	Not Required
<b>PB4.13</b>	Brownfield Register	Keep permanently	Keep permanently	None	Register of Brownfield Sites	Town and Country Planning (Brownfield Land Register) Regulations 2017	Not Required
<b>PB4.14</b>	Monitoring	Retain for the life of the plan	Retain for the life of the plan	None	Annual monitoring reports, correspondence	Business agreed retention policy	Not Required
<b>PB4.15</b>	Development Plan	Retain for life of plan or until superseded	Retain for life of plan or until superseded	None	Policy and Plans	Business agreed retention period	Not Required
<b>PB4.16</b>	External Duty to co-op	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>PB4.17</b>	Community Infrastructure Levy (CIL)	Keep permanently	Keep permanently	Personal	Live cases of payments to CIL, Regulation list of CIL	Planning Act 2008 and Community Infrastructure Levy Regulations 2010.	Legal



## PB5 Land Charges

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PB5.1</b>	Admin	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>PB5.2</b>	Finance	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None		Business agreed retention period	
<b>PB5.3</b>	Resources	Keep permanently	Keep permanently	None		Business agreed retention period	
<b>PB5.4</b>	Search Process	Securely dispose 6 months after date last modified	Delete 6 months after date last modified	None		Business agreed retention period	

# Retention and Disposal Schedule

## Procurement

## PC1 Advising

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC1.1	Contract Standing Orders	Keep permanently	Keep permanently	Personal	Contract register	Business agreed retention period	Contract
PC1.2	Council Requirements	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Contract
PC1.3	Internal Training and Communication	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Training materials, e-learning, presentations, communication, guidance	Business agreed retention period	Not Required
PC1.4	Procurement Manual	Securely dispose 3 years after superseded	Delete 3 years after superseded	None	Manuals, guidance, process diagrams	Business agreed retention period.	Not Required
PC1.5	Schools Requirements	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Contract
PC1.2	Templates and Guidance	Securely dispose 2 years after superseded	Delete 2 Years after superseded	None	Templates for procurement	Business agreed retention period	Not Required

## PC2 Collaborating

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PC2.1</b>	External Organisations	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Contract
<b>PC2.2</b>	Framework Providers	Securely dispose 6 years after last modified	Delete 6 years after date last modified	None	Suppliers contact details, Frameworks available to the council	Business agreed retention period	Not Required
<b>PC2.3</b>	Shared Services	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal	Events, meetings, resources	Limitation Act 1980 (Section 8)	Not Required

## PC3 Contracting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC3.1	Contract Management	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Not Required

## PC4 Legislation and Regulation

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PC4.1	External Advice	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	Not Required
PC4.2	Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	National Guidance, Procurement Legislation, contact details for subject matter experts,	The National Archives Best Practice	Not Required
PC4.3	Legislation	Keep permanently	Keep permanently	None	National Legislative Guidance, Procurement Legislation, contact details for subject matter experts,	Business agreed retention period	Not Required

## PC5 Planning and Strategy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PC5.1</b>	Business Plans	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None		Business agreed retention period	
<b>PC5.2</b>	Procurement Strategy	Securely dispose 3 years after date superseded	Delete 3 years after date superseded	None		Business agreed retention period	

## PC6 Procuring

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PC6.1</b>	Council Procurements	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Contract
<b>PC6.2</b>	Schools Procurements	Securely destroy last action on contract plus 12 years	Delete 12 years after date last modified	Personal		Limitation Act 1980 (Section 8)	Contract



## PC7 Reporting

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PC7.1</b>	Expenditure Analysis	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	Not Required
<b>PC7.2</b>	Monitoring Compliance	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	Not Required
<b>PC7.3</b>	Transparency	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	Not Required

# Retention and Disposal Schedule

## Property

## PR1 Strategy

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR1.1	Asset Manager Plan	Retain until superseded	Retain until superseded	None	Plan 2019-2022 - Reports - presentation - Emails	Business agreed retention period	Not Required
PR1.2	Strategic Meetings	Securely dispose 6 years after date created	Delete 6 years after date created	None	Asset Management Board (minutes/agendas, reports)	Business agreed retention period	Not Required
PR1.3	Strategy Reviews of Property Feasibility	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Asset Management Working Group (minutes/agendas, reports)	The National Archives Best Practice	Not Required

## PR2 Property Acquisition and Disposal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR2.1	Investment Properties	Securely dispose 6 years after disposal of property	Delete 6 years after disposal of property	Personal	Instructions to Legal, reports - (leases & legal documentation), Excel / Uniform Database	Estates management - Limitation Act 1980 (Section 2)	Legal
PR2.3	Operational Properties	Securely dispose 6 years after disposal of property	Delete 6 years after disposal of property	Personal	Letters to tenants, instructions to Legal, reports, advertisement, (leases & legal documentation), Excel / Uniform Database, adverts on web and newspapers	Limitation Act 1980 (Section 2)	Legal
PR2.4	Residential Properties	Securely dispose 6 years after disposal of property	Delete 6 years after disposal of property	Special Category Data	Letters to tenants, instructions to Legal, reports, (leases & legal documentation), Excel / Uniform Database	Estates management - Limitation Act 1980 (Section 2)	Legal
PR2.5	Downshire Homes Properties	Securely dispose 6 years after disposal of property	Delete 6 years after disposal of property	Personal	Letters to agents/vendors/vendors solicitors/legal dept. - Database - excel / Emails	Valuation - Limitation Act 1980 (Section 12)	Legal

## PR3 Property Maintenance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR 3.1	Planned Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	5 year cycle, Survey report, Programme agreed specification, Tender documents, Financial bids. All contract documentation. All correspondence relating to the contract. Service record spreadsheet (Excel). Service reports / Test certificates. Payment Certificates & Invoices.	Limitation Act 1980 (Section 2)	Contract
PR3.2	Refurbishment	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Records relating to refurbishments of council owned buildings	Limitation Act 1980 (Section 2)	Not Required
PR3.3	Responsive Maintenance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Requests for maintenance, Work orders, Customer satisfaction surveys	Limitation Act 1980 (Section 2)	Not Required
PR3.4	Cleaning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Cleaning Contracts and Specifications	Limitation Act 1980 (Section 2 & Section 8)	Contract

## PR4 Property and Land Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR4.2	Building Surveys	Retain until superseded	Retain until superseded	None	Property condition surveys	Limitation Act 1980 (Section 8)	Not Required
PR4.3	Certification	Securely dispose 6 years after certificate expiration	Delete 6 years after date certificate expires	None	Property certificates	Limitation Act 1980 (Section 2)	Not Required
PR4.4	Distribution and Allocation of Properties	Securely dispose 6 years after last modified	Delete 6 years after last modified	None	Property files	Business agreed retention period	Not Required
PR4.5	Energy Management	Securely dispose 6 years after last modified	Delete 6 years after last modified	Personal	EPC Certificates - All contract documentation. All correspondence relating to the contract. Service record spreadsheet (Excel). Service reports / Test certificates. Payment Certificates & Invoices.	Business agreed retention period	Legal
PR4.6	Equipment Disposal	Securely dispose 6 years after date equipment last used	Delete 6 years after disposal date.	None	Details of equipment disposed of	Limitation Act 1980 (Section 2)	Not Required
PR4.7	Farm Management	Securely dispose 6 years after smallholding ended	Delete 6 years after date ended	None	All records relating to farm management	Limitation Act 1980 (Section 2)	Not Required
PR4.8	Feasibility	Securely dispose 11 years after last modified	Delete 11 years after last modified	None	Feasibility studies	Business agreed retention period	Not Required
PR4.10	Health and Safety	Retain until superseded	Retain until superseded	None	Health and Safety Files	Construction Design & Management Regulations	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR4.11	Internal Agreements	Securely dispose 6 years after agreement end	Delete 6 years after date agreement ended	None	Service level agreements and associated documentation	Business agreed retention period	Not Required
PR4.12	Land and Property History	Keep permanently	Keep permanently	None	Land and property files	Business agreed retention period	Not Required
PR4.13	Leasing	Securely dispose 6 years after lease end	Delete 6 years after date lease ended	Personal	Leases, licenses & wayleaves	Landlord & Tenant Act	Legal
PR4.14	Management	Retain until superseded	Retain until superseded	None	Corporate asset management plans	Business agreed retention period	Not Required
PR4.15	Maps and Directions	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Maps and directions to land and property	Business agreed retention period	Not Required
PR4.16	Property Services	Securely dispose 12 years after date last modified	Delete 12 years after date last modified	None	All records relating to property services	Limitation Act 1980 (Section 8)	Not Required
PR4.17	Replacement Programme	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	All records relating to the replacement programme	The National Archives Best Practice	Not Required
PR4.18	Scheduling	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Schedules	The National Archives Best Practice	Not Required
PR4.19	Security	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	All records relating to property security	The National Archives Best Practice	Not Required
PR4.20	Usage Statistics	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports and data regarding property usage	The National Archives Best Practice	Not Required
PR4.21	Valuations	Securely dispose 12 years after disposal of property	Delete 12 years after disposal of property	None	Land and property valuations	Limitation Act 1980 (Section 12)	Not Required

## PR5 Property Use and Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PR5.2</b>	Design and Construction	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Property design and construction details	Business agreed retention period	Not Required
<b>PR5.3</b>	Traveller Sites	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Information regarding traveller sites	Limitation Act 1980 (Section 2)	Not Required
<b>PR5.4</b>	Warehousing and Storage	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Details of warehousing and storage units	Business agreed retention period	Not Required



## PR6 Facilities Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PR6.1</b>	Access Control	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	New starter details, Access requirements register, Times entering/leaving, Parking requests	The National Archives Best Practice	Not Required
<b>PR6.2</b>	Facilities	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		The National Archives Best Practice	Not Required
<b>PR6.3</b>	Contractors	Securely dispose 6 years after last modified	Delete 6 years after last modified	Special Category Data	Contractors DBS records	The National Archives Best Practice	Legal
<b>PR6.4</b>	Buildings (Commercial Centre)	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Property file	The National Archives Best Practice	Not Required
<b>PR6.16</b>	Buildings (Times Square)	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Property file	The National Archives Best Practice	Not Required

## PR8 Look Out Facilities Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PR8.1	Evac-Chair	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Maintenance checks, records of trained users	The National Archives Best Practice	Not Required
PR8.2	Fire Alarms	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All contract documentation. All correspondence relating to the contract. Service record spreadsheet (Excel). Service reports / Test certificates. Payment Certificates & Invoices	The National Archives Best Practice	Legal
PR8.3	Fire Marshalls	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Building fire marshall details	The National Archives Best Practice	Not Required
PR8.4	First Aid	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Details of trained first aiders	The National Archives Best Practice	Not Required
PR8.5	Furniture	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Furniture asset register	Business agreed retention period	Not Required
PR8.6	Parking	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Permits for parking	The National Archives Best Practice	Not Required
PR8.7	Security Passes	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	New starter details, Access requirements register, Times entering/leaving,	The National Archives Best Practice	Not Required
PR8.9	Heating	Securely dispose 6 years	Delete 6 years after	Personal	Engineer certificates, service certificates, specifications,	Business agreed	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
		after disposal of property	disposal of property		instructions, service contracts, agreements	retention period	
<b>PR8.10</b>	Utilities	Securely destroy last action on contract plus 6 years	Delete 6 years after date last modified	Personal	Electricity, Gas, Water. All contract documentation. All correspondence relating to the contract. Service record spreadsheet (Excel). Service reports / Test certificates. Payment Certificates & Invoices	The National Archives Best Practice	Contract
<b>PR8.11</b>	Contractors	Securely dispose 6 years after last modified	Delete 6 years after last modified	Special Category Data	Contractors DBS records	The National Archives Best Practice	Legal

# Retention and Disposal Schedule

## Public Health Bracknell

## PH1 Adult Activity

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH1.1	Physical Activity	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	Emails, reports, registration forms	Business agreed retention period	Public Task
PH1.2	Smoking Cessation	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	Special Category Data	Emails, reports, call records	Records Management Code of Practice for Health and Social Care 2016	Public Task
PH1.3	Mental Health	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	Mental Health Act 1983	Not Required
PH1.4	Drug & Alcohol	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH1.5	Sexual Health	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
PH1.6	Healthy Eating	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH1.7	Workplace Health	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH1.8	Student Health	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PH1.9</b>	Carers	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
<b>PH1.10</b>	National Diabetes Prevention Programme	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
<b>PH1.11</b>	NHS Health Checks	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
<b>PH1.12</b>	People with LD	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required

## PH2 CYP and Families Activity

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH2.1	Physical Activity	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.2	Smoking Cessation	Securely dispose 2 years after 18th birthday	Delete 20 years after date of birth	None	Emails, reports	Business agreed retention period	Not Required
PH2.3	Mental Health	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Personal	Emails, reports	Business agreed retention period	Public Task
PH2.4	Drug & Alcohol	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.5	Sexual Health	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.6	Healthy Eating	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.7	Parents	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.8	Young Carers	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PH2.9	Pregnancy & Neonatal	Securely dispose 25 years after date last modified	Delete 25 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required

## PH3 Community Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH3.1	Warm Welcome Programme	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Emails, contact details, group information and location	The National Archives Best Practice	Public Task
PH3.2	Social Prescription	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Emails, reports, contracts, call records	The National Archives Best Practice	Public Task
PH3.3	Volunteering	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Emails, reports	The National Archives Best Practice	Not Required
PH3.4	Prevention and Self-Care	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
PH3.5	Making every contact count (MECC)	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Emails, reports, training data, sign-up sheets	The National Archives Best Practice	Public Task



## PH4 Contracts and Grants

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH4.1	Contracts	Securely dispose 6 years after end of contract	Delete 6 years after end of contract	None	Emails, contracts, tender documentation	Information Governance Alliance Records Management Code of Practice for Health and Social Care 2016	Not Required
PH4.2	Grants	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Emails, reports, grant documentation	Business agreed retention period	Not Required
PH4.3	Waivers/extensions	Securely dispose 6 years after end of contract	Delete 6 years after end of contract	None	Emails, reports, waiver/extension documentation	Limitation Act 1980 (Section 8)	Not Required
PH4.4	Funding/bids	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Emails, Bids	HMRC - Compliance Handbook Manual CH15400	Not Required
PH4.5	Commissioning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## PH5 Health Protection

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PH5.1</b>	Immunisation	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
<b>PH5.2</b>	Screening	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
<b>PH5.3</b>	Emergency planning	Securely dispose 30 years after date last modified	Delete 30 years after date last modified	None	Emails, reports	Records Management NHS Code of Practice, Serious Incident Files, Pg. 82	Not Required

## PH6 Operational Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH6.1	Meetings	Securely dispose 6 years after date created	Delete 6 years after date created	None	Emails, meeting minutes, agendas	NHS England	Not Required
PH6.2	Performance data	Securely dispose 7 years from date created	Delete 7 years after date created	None	Emails, reports, performance data	NHS England	Not Required
PH6.3	Gov Delivery	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Email templates	The National Archives Best Practice	Public Task
PH6.4	Consent forms	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	Personal	Emails, consent forms	Business agreed retention period	Consult
PH6.5	Website development (Portal & Thrive)	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Emails, website content, contact details	Records Management Code of Practice for Health and Social Care 2016	Public Task
PH6.6	Promotional Resources	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Promotional material, photos, reports, stock images, feedback, case studies	The National Archives (TNA)	Not Required
PH6.7	PH audit activities	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	None	Emails, reports, audits	Records Management Code of Practice for Health and Social Care 2016	Not Required
PH6.8	GP & Pharmacy Lists	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	Personal	Emails, contact details	Business agreed retention period	Public Task
PH6.9	Invoices	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Email, Invoices	The National Archives (TNA)	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH6.10	Team Meetings	Securely dispose 5 years after date last modified	Delete 5 years after date last modified	None	Agendas, Meeting minutes, action logs	NHS England	Not Required
PH6.11	FOI Requests	Securely dispose 3 years after the request is complied with	Delete 3 years after request is complied with	None		Business agreed retention period	Not Required
PH6.12	PH Budget	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	Not Required

## PH7 Information Intelligence

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH7.1	Joint Strategic Needs Assessment	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Reports, JSNA Chapters, Data tables	Business agreed retention period	Not Required
PH7.2	Literature Reviews	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Literature Reviews	The National Archives (TNA)	Not Required
PH7.3	Guidance Documents	Send to Archives 10 years after date last modified	Send to Archives 10 years after date last modified	None	Reports, Guidelines, Audit documents	The National Archives (TNA)	Not Required
PH7.4	Data	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Data tables, charts, graphs	The National Archives (TNA)	Not Required
PH7.5	Health Needs Assessments	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## PH8 CCG/PCN/ICS

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PH8.1</b>	Clinical Commissioning Groups (CCG)	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required
<b>PH8.2</b>	Primary Care Networks (PCN)	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required
<b>PH8.3</b>	Integrated Care Systems (ICS)	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required

## PH9 Community Response COVID-19

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH9.1	Shielding Data	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.2	Scripts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.3	Government	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.4	Welfare Checks	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.5	VCS Partners	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.6	Food	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.7	Customer Service's Calls	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
PH9.8	Communications	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH9.9	Task & Finish Group	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	



## PH10 COVID-19

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PH10.1	Shielding Data	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Records management Code of Practice for Health and Social Care 2016	
PH10.2	Scripts	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Records management Code of Practice for Health and Social Care 2016	
PH10.3	Government	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Records management Code of Practice for Health and Social Care 2016	
PH10.4	Welfare Checks	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Records management Code of Practice for Health and Social Care 2016	
PH10.5	VCS Partners	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	Special Category Data		Records management Code of Practice for Health and Social Care 2016	

# Retention and Disposal Schedule

## Public Health Berkshire

## PHB1 Strategic Leadership

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB1.1	Health & Wellbeing boards	Secure disposal 6 years after date last modified	Delete 6 years after last modified date	None	Board meeting agendas, papers and minutes. Board, Board Advisory Groups and Sub-committees. Correspondence: Chair, Secretary, Members. Membership lists. Terms of reference	Business agreed retention period	Not Required
PHB1.2	Sector lead improvement	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	Not Required
PHB1.3	Policy areas	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	Not Required
PHB1.4	Berkshire PH Network	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	Not Required
PHB1.5	Public Health Grant	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Grant information	Business agreed retention period	Not Required
PHB1.6	Director of Public Health	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Working documents	The National Archives Best Practice	Not Required
PHB1.7	Safeguarding	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Safeguarding Policies/Procedures/ Protocols	Business agreed retention period	Not Required

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB1.8	Child Death Overview Panel	Keep permanently	Keep permanently	Personal	Case notes, coroners reports, police reports	Business agreed retention period	Legal
PHB1.9	Complaints and Serious Incidents	Secure disposal 20 years after date last modified	Delete 20 years after date last modified	Personal		Business agreed retention period	
PHB1.10	Meetings	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB1.11	Annual Reports	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB1.12	CCG Core Offer	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB1.13	ICS Work	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## PHB2 Business

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB2.1	Contracts	Secure disposal 6 years after end of contract	Delete 6 years after end of contract	None	Emails, contracts, tender documentation	Records Management Code of Practice for Health and Social Care 2016	Not Required
PHB2.2	Contracts Activity	Secure disposal 6 years after end of contract	Delete 6 years after end of contract	Personal	Emails, reports, performance data	Records Management Code of Practice for Health and Social Care 2016	Not Required
PHB2.3	Grants & MOU	Secure disposal 7 years after date last modified	Delete 7 years after date last modified	None	Emails, reports, grant documentation	Business agreed retention period	Not Required
PHB2.4	Risk Management	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	None		Business agreed retention period	
PHB2.5	Invoices	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	None		Business agreed retention period	
PHB2.6	Tenders	Secure disposal 6 years after end of contract	Delete 6 years after end of contract	None		Records Management Code of Practice for Health and Social Care 2016	
PHB2.7	Projects	Securely dispose 2 years after date last modified	Delete 2 years after date last modified	None		Business agreed retention period	

## PHB3 Public Health Programmes

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB3.1	Health Protection	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Case information, documents	Business agreed retention period	Legal
PHB3.2	Sexual Health	Securely dispose 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	Records Management Code of Practice for Health and Social Care 2016	Not Required
PHB3.3	Emergency planning	Securely dispose 30 years after date last modified	Delete 30 years after date last modified	None	Emails, reports	Records Management NHS Code of Practice, Serious Incident Files, Pg. 82	Not Required
PHB3.4	Mental Health	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Emails, reports	Business agreed retention period	Not Required
PHB3.5	Emergency Response Plans	Keep permanently	Keep permanently	None		Business agreed retention period	
PHB3.6	Health Improvement	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB3.7	Healthcare and Premature Mortality	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB3.8	Wider Detriments	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB3.9	Substance Misuse	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## PHB4 Public Health Intelligence

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB4.1	Information governance	Securely dispose at end of Data Access Agreement date if not renewed	Delete at end of Data Access Agreement date if not renewed	None	Governance reviews and reports	Business agreed retention	Not Required
PHB4.2	Data	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Data tables, charts, graphs	The National Archives (TNA)	Not Required
PHB4.3	Guidance documents	Secure disposal 3 years after date last modified	Delete 3 years after date last modified	None	Reports, Guidelines, Audit documents	Business agreed retention period	Not Required
PHB4.4	Maps	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Maps, Plans, Drawings	Business agreed retention period	Not Required
PHB4.5	Data destruction certificates	Securely dispose at end of Data Access Agreement date if not renewed	Delete at end of Data Access Agreement date if not renewed	None		Business agreed retention period	
PHB4.6	Data visualisation	Secure disposal 3 years after date last modified	Delete 3 years after last modified date	None		Business agreed retention period	
PHB4.7	Public Health Projects	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB4.8	Research and Audit	Secure disposal 5 years after date last modified	Delete 5 years after date last modified	None		Business agreed retention period	

## PHB5 NHS Groups

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>PHB5.1</b>	Clinical Commissioning Groups	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required
<b>PHB5.2</b>	Integrated Care Systems	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required
<b>PHB5.3</b>	NHS Provider Organisations	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required
<b>PHB5.4</b>	Primary Care Networks	Secure disposal 10 years after date last modified	Delete 10 years after date last modified	None	Emails, reports	The National Archives (TNA)	Not Required



## PHB6 Communications and Publications

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
PHB6.1	Surveys	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
PHB6.2	Internal Comms	Secure disposal 2 years after date last modified	Delete 2 years after date last modified	None		NHSD Health and Social Care Retention Schedule	
PHB6.3	Resources	Secure disposal 5 years after date last modified	Delete 5 years after date last modified	None		NHSD Health and Social Care Retention Schedule	
PHB6.4	Campaigns	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	None	Published campaign material	Business agreed retention period	Not Required
PHB6.5	Websites	Secure disposal 6 years after date last modified	Delete 6 years after date last modified	Personal	Emails, website content, contact details	Information Governance Alliance Records Management Code of Practice for Health and Social Care 2016	Public Task

# Retention and Disposal Schedule

## Registration

## RG1 Ceremonies

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>RG1.1</b>	Civil Marriages	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Marriage Notices and Civil Partnerships	Business agreed retention period	Legal
<b>RG1.2</b>	Civil Partnerships	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Marriage Notices and Civil Partnerships	Business agreed retention period	Legal
<b>RG1.3</b>	Renewal of Vows	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Files relating to the organisation and administration of renewal of vows ceremonies	The National Archives Best Practice	Legal
<b>RG1.4</b>	Naming Ceremonies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Files relating to the organisation and administration of naming ceremonies	The National Archives Best Practice	Legal
<b>RG1.5</b>	Citizenship Ceremonies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Files relating to the organisation and administration of citizenship ceremonies	Office of Immigration Service Commissioner (OISC)	Legal
<b>RG1.6</b>	Commitment Ceremonies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Files relating to the organisation and administration of commitment ceremonies	The National Archives Best Practice	Legal

## RG2 Communications & Engagement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>RG2.1</b>	Partnerships	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Communication, meeting minutes, background papers, partnership agreements	Business agreed retention period	Not Required
<b>RG2.2</b>	Plans	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Registration service plans	The National Archives Best Practice	Not Required

## RG3 Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>RG3.1</b>	Audits	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Audit reports	CIPFA Code of Practice for Internal Audit in Local Government in the United Kingdom	Not Required
<b>RG3.2</b>	Risk Assessments	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Risk assessments	Health & Safety regulations. Retention Guidelines for Local Authorities para 9.7	Not Required
<b>RG3.3</b>	Annual Report	Securely dispose 3 years after date created	Delete 3 years after date created	None	Annual service report	Business agreed retention period	Not Required

## RG4 Operations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
RG4.1	Banking	Securely dispose 7 years after date last modified	Delete 7 years after date last modified	None	Cash book, banking sheets, accounts, transactions, charges, receipts	General Register Office	Not Required
RG4.2	Process & Guidance	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Process and guidance documents	Business agreed retention period	Not Required
RG4.3	Reporting	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Management reports	Business agreed retention period	Not Required
RG4.4	Templates	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	None	Forms and templates	Business agreed retention period	Not Required
RG4.5	Records & Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Operational records and reports	Business agreed retention period	Legal
RG4.6	Licenses	Securely dispose 3 years after date last modified	Delete 3 years after date last modified	Personal	Approved premises licensing	Limitation Act 1980 (Section 2)	Legal
RG4.7	Data Sharing Agreements	Keep permanently	Keep permanently	None		Business agreed retention period	
RG4.8	Terms and Conditions	Keep permanently	Keep permanently	Personal		Business agreed retention period	

## RG5 Services

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>RG5.1</b>	European Passport Return Service	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	All records relating to applications for the European passport return service	Office of Immigration Service Commissioner (OISC)	Legal

# Retention and Disposal Schedule

## **Safeguarding Board**

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## SB1 Safeguarding Board

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB1.1	Annual Reports	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.2	Contingency Work	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.3	Exploitation	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.4	Forward Plan	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.5	Governance and Policies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.6	Independent Chair and Scrutineer	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB1.7	Induction	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.8	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.9	Risk Framework	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB1.10	Risk Register	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>SB1.11</b>	Strategic Plan	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.12</b>	Transition	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## SB2 Safeguarding Partnership

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>SB2.1</b>	Forward Plan	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB2.2</b>	Governance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB2.3</b>	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## SB3 QA Sub Group

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB3.1	Governance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.2	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.3	Partner Presentations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.4	Performance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.5	Section 11 and Self-assessments	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.6	Task and Finish Groups	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB3.7	Themes	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None		Business agreed retention period	

## SB4 Case Review Sub Group

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB4.1	Adult Notifications & SARs	Securely manually dispose 25 years after date last modified	Manually delete 25 years after date last modified	Personal		Business agreed retention period	
SB4.2	Blank Forms & Templates	Securely manually dispose 6 years after date last modified	Manually delete 6 years after date last modified	None		Business agreed retention period	
SB4.3	Child Notifications & CSPRs	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
SB4.4	Contracts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB4.5	CR Subgroup Meetings	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
SB4.6	Governance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB4.7	Guidance Docs	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB4.8	Independent Reviewers	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
SB4.9	NSPCC Case Reviews	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB4.10	Task and Finish Groups	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

## SB5 Communication, Engagement and Prevention

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB5.1	Briefings and Forums	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB5.2	Consultations	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
SB5.3	Governance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB5.4	Logos	Retain until superseded	Retain until superseded	None		Business agreed retention period	
SB5.5	Meetings	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB5.6	Social Media	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB5.7	Website	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB5.8	Work Plans	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	None		Business agreed retention period	

## SB6 Learning and Development

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>SB6.1</b>	BF Training	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>SB6.2</b>	Contracts	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB6.3</b>	East Berks L&D	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## SB7 Policy and Procedures

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>SB7.1</b>	Adult P&P	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
<b>SB7.2</b>	Children P&P	Securely manually dispose 15 years after date last modified	Manually delete 15 years after date last modified	Personal		Business agreed retention period	
<b>SB7.3</b>	Local Strategies	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB7.4</b>	Thresholds	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	



## SB8 Business Unit

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB8.1	Finance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB8.2	FOI	Securely dispose 1 year after date last modified	Delete 1 year after date last modified	Personal		Business agreed retention period	
SB8.3	Guidance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB8.4	Membership Details	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB8.5	One Notes	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
SB8.6	Report and Letter Templates	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
SB8.7	Team Meetings and Planning	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## SB2 Other Partnerships

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>SB1.1</b>	Care Governance Board	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.2</b>	CDOP	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>SB1.3</b>	Children and Young Peoples Board	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.4</b>	Community Cohesion and Engagement Partnership	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.5</b>	Community Safety Partnership	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>SB1.6</b>	Corporate Parenting	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>SB1.7</b>	DA Exec	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.8</b>	Health and Wellbeing Board	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	
<b>SB1.9</b>	MOU	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
<b>SB1.10</b>	Prevent	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
SB1.11	Public Health	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period	

## Retention and Disposal Schedule

### **Transport and Infrastructure**

## TR2 Drainage Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR2.1	Sustainable Urban Drainage Systems	Securely dispose after end of life of drainage system	Delete after end of life of drainage system	Personal		The National Archives Best Practice	
TR2.2	Flood Water Management	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Special Category Data		Highways Act 1980 s118	

## TR3 Highway Status

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR3.1	Highway Extent Queries	Keep permanently	Keep permanently	Personal		Business agreed retention period	
TR3.2	Highway Extinguishment	Keep permanently	Keep permanently	None		Business agreed retention period	
TR3.3	Highways Adoption	Keep permanently	Keep permanently	None		Business agreed retention period	
TR3.4	Public Request for Highway Adoption	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
TR3.5	Street Naming & Numbering	Keep permanently	Keep permanently	None		Business agreed retention period	

## TR4 Highway Enforcement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR4.1	Bay Supervisions/ Dispensations	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Traffic Management Plans	Business agreed retention period.	Not Required
TR4.2	Enforcement Actions	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		Business agreed retention period.	

## TR5 Public Transport

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR5.1	Buses	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Special Category Data	Operator information, link to timetables	Business agreed retention period	Not Required
TR5.2	Air Travel	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Personal		Business agreed retention period	
TR5.3	Concessionary Travel	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Business agreed retention period	
TR5.4	Trains	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Personal	Operator information, link to timetables	Business agreed retention period	Not Required



## TR6 Road Safety

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR6.1	Road Safety Awareness	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Correspondence, Contract Info	Business agreed retention period	Not Required
TR6.2	Road Traffic Collisions	Keep permanently	Keep permanently	Special Category Data	Audits, Reports Plans, Investigations	Business agreed retention period	Not Required
TR6.3	Safety Audits	Securely dispose after end of life of highway	Delete after end of life of highway	None	Audits, Reports Plans	Business agreed retention period	Not Required
TR6.4	Road Safety Improvement	Securely dispose after end of life of highway	Delete after end of life of highway	Personal		Business agreed retention period	
TR6.5	Speed Cameras	Securely dispose after end of life of highway	Delete after end of life of highway	Personal	Audits, Reports Plans	Business agreed retention period	Not Required

## TR7 School Transport

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR7.1	Mainstream School Transport	Securely dispose 7 years after date created	Delete 7 years after date created	Special Category Data	Applications, Refusals, Appeals, Confirmation acceptance records, pupil records	Limitation Act 1980 (Section 2)	Public Task
TR7.2	Special Education Needs and Post 16 Transport	Securely dispose 20 years after date created	Delete 20 years after date created	Special Category Data	Applications, Refusals, Appeals, Confirmation acceptance records, pupil records	Business agreed retention period	Public Task
TR7.3	Transport Operators	Securely dispose 7 years after date created	Delete 7 years after date created	Special Category Data	Contract agreements, records of providers	Limitation Act 1980 (Section 2)	Public Task
TR7.4	Admin and Finance	Securely dispose 7 years after date created	Delete 7 years after date created	Special Category Data		Limitation Act 1980 (Section 2)	

## TR8 Community Transport

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR8.1	Providers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		The National Archives Best Practice	
TR8.2	Passengers	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Bookings, passenger records, SLA's, financial records, bus passes	The National Archives Best Practice	Public Task

## TR9 Fleet Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>TR9.1</b>	Vehicle Management	Securely dispose 6 years after end of use of vehicle	Delete 6 years after end of use of vehicle	None	Maintenance Schedules, Vehicle Files, Section 19 Permits	Limitation Act 1980 (Section 2)	Not Required
<b>TR9.2</b>	Driver Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal	Driver licences, driver training records	The National Archives Best Practice	None
<b>TR9.3</b>	Fuel Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Transactions, management checks	The National Archives Best Practice	Not Required
<b>TR9.4</b>	Admin and Finance	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None		The National Archives Best Practice	

## TR10 Traffic Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR10.1	Monitoring	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data	Accident records - fatal	Fatalities - Limitation Act 1980 (Section 2)	Legal
TR10.2	Parking	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data	Enquiries, New Scheme - Plans, Disabled Parking	Business agreed retention period	Public Task
TR10.3	Vehicle Access	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Special Category Data		Limitation Act 1980 (Section 2)	
TR10.4	Controlled Crossings	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data		Business agreed retention period	
TR10.5	Speed Limits	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data		Business agreed retention period	
TR10.6	Schemes	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data		Business agreed retention period	

## TR11 Transport Planning

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR11.1	Development Management	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	None	Planning consultations	Business agreed retention period	Not Required
TR11.2	Transport Strategy	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Personal	Strategies, Policies, Bids	Business agreed retention period	Not Required
TR11.3	Walking & Cycling	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data		Business agreed retention period	
TR11.4	Smart Vehicle	Securely dispose 6 years after date last modified	Delete 6 years after date last modified	Personal		Business agreed retention period	
TR11.5	Transport Modelling	Securely dispose 20 years after date last modified	Delete 20 years after date last modified	Personal	Requests to use the model/data from model, Traffic Data Requests, Development Modelling.	Business agreed retention period	Not Required
TR11.6	Travel Plans	Securely dispose after end of life of travel plan	Delete after end of life of travel plan	None	School Travel Plans, Business Travel Plans, Development Travel Plans	Business agreed retention period	Not Required

## TR12 Network Management

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR12.1	Intelligent Transport Systems	Securely dispose after end of life of highway/junction	Delete after end of life of highway/junction	None	Signal layouts, timings, technical information, Emergency TM Plans, ITS, ICT systems, Communications	Business agreed retention period	Not Required
TR12.2	Road Classification	Securely dispose after end of life of highway	Delete after end of life of highway	None		Business agreed retention period	
TR12.3	Winter Maintenance	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	None		Business agreed retention period	
TR12.4	Licensing & Permits	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Special Category Data	TM Plans, SWQR details, Risk Assessments, PLI	Business agreed retention period	Public Task
TR12.5	Temp Traffic Regulation Order/Notices	Securely dispose after end of life of highway	Delete after end of life of highway	None	PLI, Plans, Pro-formas, Letters to residents	Business agreed retention period	Not Required

## TR13 Public Enquiries

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR13.1	Structures	Securely dispose after end of life of the structure	Delete after end of life of the structure	None		Business agreed retention period	
TR13.2	Emergency Works	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	None		Business agreed retention period	
TR13.3	Highway Inspections	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	None		Business agreed retention period	
TR13.4	Roads & Footways	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Special Category Data		Business agreed retention period	
TR13.5	Trees & Verges	Securely dispose 21 years & 9 months after date last modified	Delete 21 years & 9 months after date last modified	Special Category Data		Business agreed retention period	
TR13.6	Planned Maintenance	Securely dispose after end of life of highway	Delete after end of life of highway	None		Business agreed retention period	
TR3.7	Street Lighting	Securely dispose after end of life of the streetlight	Delete after end of life of the streetlight	Personal		Business agreed retention period	
TR3.8	Drains & Gullies	Securely dispose after end of life of highway	Delete after end of life of highway	Special Category Data		Business agreed retention period	



## TR14 Reports

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR14.1	Reports	Retain until superseded	Retain until superseded	Personal	Transport and Infrastructure reports	Business agreed retention period	Legal

## TR15 Compliance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>TR15.1</b>	Guidance	Retain until superseded	Retain until superseded	None	Guidance documents	Business agreed retention period.	Not Required
<b>TR15.2</b>	Legislation	Retain until superseded	Retain until superseded	None	Legislation documentation and guidance	Business agreed retention period.	Not Required
<b>TR15.3</b>	Policies and Strategy	Retain until superseded	Retain until superseded	None	Policy and strategy documents	Business agreed retention period.	Not Required

## TR16 Parking Management and Enforcement

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
TR16.1	Parking Management	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	None		Business agreed retention period.	
TR16.2	Enforcement	Securely dispose 15 years after date last modified	Delete 15 years after date last modified	Personal		Business agreed retention period.	

# Retention and Disposal Schedule

## Waste

## WM1 Waste Collection

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM1.1</b>	Garden Waste	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists	Limitations Act - (Waste Applications) -The Waste (England and Wales) Regulations 2011	Legal
<b>WM1.2</b>	Recycling	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists	Limitations Act - Environmental Protection Act 1990, (Waste Applications) -The Waste (England and Wales) Regulations 2011	Legal
<b>WM1.3</b>	Refuse Collection	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists	Limitations Act, (Waste Applications) -The Waste (England and Wales) Regulations 2011	Legal
<b>WM1.4</b>	Clinical Waste	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Special Category Data	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists	Limitations Act, (Waste Applications) -The Waste (England and Wales) Regulations 2011, Safe management of healthcare waste Version; 2.0: England (spaceforhealth.nhs.uk)	Legal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM1.5</b>	Assisted Collections	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Special Category Data	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists,	Limitations Act, (Waste Applications) -The Waste (England and Wales) Regulations 2011	Legal
<b>WM1.6</b>	Food Waste	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Customer Enquiries, Waste Applications, Communications and Campaigns, Location Lists	Limitations Act - (Waste Applications) -The Waste (England and Wales) Regulations 2011	Legal

## WM2 Street Cleansing

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM2.1</b>	Fly Tipping	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.2</b>	Graffiti and Fly Posting	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.3</b>	Litter Management	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.4</b>	Sweeping	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.5</b>	Dead Animals	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.6</b>	Shopping Trolleys	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.7</b>	Public Toilets	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task
<b>WM2.8</b>	Take Pride	Securely dispose 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	Personal	Public enquiries	The National Archives Best Practice	Public Task

## WM3 Waste Disposal

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM3.1</b>	Performance and Reporting	Keep permanently	Keep permanently	None	Reports, Key performance indicators, draft committee reports	Business agreed retention period	Not Required
<b>WM3.2</b>	Waste Strategies	Retain until superseded and offer to archives	Retain until superseded and offer to archives	None	Strategies and Policies	Business agreed retention period	Not Required



## WM4 Waste Contracts

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM4.1</b>	Waste Disposal Contracts	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	None	Contracts, Annexes, variations of contracts and operational minutes	Environmental Permitting Regulations (England and Wales) 2010.	Not Required
<b>WM4.2</b>	Waste Collection Contracts	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	None	Contracts, Annexes, variations of contracts and operational minutes	Environmental Permitting Regulations (England and Wales) 2010.	Not Required
<b>WM4.3</b>	Street Cleansing Contracts	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	None	Contracts, Annexes, variations of contracts and operational minutes	Environmental Permitting Regulations (England and Wales) 2010.	Not Required
<b>WM4.4</b>	Contract Board	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	Personal	Contract board meeting minutes, agendas and reports	Environmental Permitting Regulations (England and Wales) 2010.	Legal
<b>WM4.5</b>	Grounds Maintenance Contract	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	None	Contracts, Annexes, variations of contracts, contract monitoring and operational minutes	Environmental Permitting Regulations (England and Wales) 2010	Not Required
<b>WM4.6</b>	Roundabout Sponsorship Contract	Retain for term of contract plus 12 years	Retain for term of contract plus 12 years	None	Contracts, Annexes, variations of contracts, contract monitoring and operational minutes	Environmental Permitting Regulations (England and Wales) 2010	Not Required

## WM5 Waste Consultations

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM5.1</b>	Consultations	Keep permanently and offer to archives	Keep permanently and offer to archives	Special Category Data	Maps, Planning Consultations, Adoption Consultations	Environmental Protection Act 1990	Legal
<b>WM5.2</b>	Surveys	Keep current year plus 5 years after date last modified	Delete 6 years after date last modified	Personal	Surveys, Reports	Environmental Protection Act 1990	Legal

## WM6 Grounds Maintenance

Reference	Description / Transactions	Disposal Action for Paper	Disposal Action for Digital	Contains Personal / Special Category Data	Example Records	Statutory Provision / Authority	Lawful Basis for Processing
<b>WM6.1</b>	Land Management	Securely destroy 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	None	Customer Enquiries, Location Lists	Business agreed retention period	Not Required
<b>WM6.2</b>	Winter Work	Securely destroy 6 years after date last modified/enquiry completed	Delete 6 years after date last modified	None	Customer Enquiries, Location Lists	Business agreed retention period	Not Required