

Asset Strategy Retention Schedule - Correct as of 22 May 2018.

The Council makes every effort to publish its latest retention schedules, there may be occasions in which this document does not reflect current practice due to when it was published.

| Ref No | Title | Description | Retention Period | Statutory Provisions | Action at end of record life |
|---------------------------------|--|--|--|---------------------------------|--|
| Monitoring | | | | | |
| M1 | Revenue budget monitoring | To assist budget holders in the management of their budgets. | 12 years | Common practice | Destroy/Delete |
| M2 | Capital budget monitoring | To assist budget holders in the management of their budgets. | 12 years | Common practice | Destroy/Delete |
| Benchmarking/Performance | | | | | |
| B1 | Benchmarking/Performance Indicators | Measuring performance against other organisations | 5 years | Common practice | Destroy/Delete |
| B2 | Government submission | Submissions to government to facilitate national benchmarking and to comply with legislation. | 10 years | Common practice | Destroy/Delete |
| B3 | Carbon Reduction Commitment | Evidence pack to support CRC submission. | 6 years | Legislation | Destroy/Delete |
| Reports | | | | | |
| R1 | Annual Reports | Short term asset reports documenting annual performance. | 5 years | Common practice | Destroy/Delete |
| R2 | Asset Management/Long term reports | Long term asset management reports/strategies. | Permanent - until updated Superseded reports held for 5 years for reference | Common practice | Destroy/Delete |
| Asset Data | | | | | |
| D1 | Asset of Community Value | List and supporting documentation pertaining to an Asset of Community Value. | 5 years | Legislation - Localism Act 2011 | Destroy/Delete |
| D2 | Asset Data | Information pertaining to a council asset. | lifetime of asset or when superseded | Common practice | Destroy/Delete |
| D3 | Dataset | Asset dataset that is maintained and updated. | Permanent (final versions) - updated. Other material destroyed. | Common practice | Permanent preservation |
| D4 | Consultation projects/including analysis | To inform decision making | 3 years | Common practice | Destroy - delete file/confidential waste |
| D5 | Notifications/Applications | | 7 Years | Common practice | Destroy/Delete |
| Projects | | | | | |
| P1 | Project Work | Project document (Project files, Review documentation, correspondence, PIDS, Presentations, analysis, funding submissions and Reports) | 5 years from end of project | Common practice | Destroy/Delete |
| P2 | Capital Investment Documentation | Documentation supporting the capital investment process (bid forms, appraisal panel, reports) | Permanent | Common practice | Destroy/Delete |
| P3 | Funding Documentation | Documentation supporting specific funding applications | 10 years or for the duration of funding | Common practice | Destroy/Delete |
| P4 | VAT/CCL Declarations | Declarations submitted to utility companies to apply for reduced VAT/CCL exemption. | 6 years | Legislation | Destroy/Delete |