

Last Updated

Sept 17

Review Date

Mar 18

Heritage - Records Retention Schedule

Heritage										
Function Description	Record Code	Main File/Class Title	Manual/ Electronic	Arrangement	Destroy/ Review	Retention Period (Years)			Notes	Vital Record
						In Office	Archived	Total		
Financial Transactions	HER/VM/Budgets	Budget and Order Information - including purchase orders and vendor information	Electronic	A	Destroy			6 Years		✓
Contractual Information	HER/JR/Contracts	Contracts - relating to artists and contracted services	Electronic	A	Destroy			6 Years	Actual Signed copies kept manually Further copies stored electronically	✓
Premises Functions	Fulwell Mill	Premises Related Information - including Fire, Water and Legionella	Electronic	A	Destroy	6 Years		6 Years	Premises leased to Community Opportunities on a long lease. Paperwork retained in connection with Mill only whilst capital repair works are undertaken	
Financial Transactions	HER/JR/Petty Cash	Petty Cash - returns and collections, cash collections, paying in slips	Manual and Electronic	A	Destroy	6 Years		6 Years	Manual receipts kept for 6 years	✓
Personnel	HER/JR/Staff Returns	Staff Returns/Sickness, Annual Leave	Electronic/ Manual	A	Destroy			6 Years	Electronic returns stored centrally, sickness forms etc forwarded to central HR. Staff	✓
Heritage Records	HER/JR/VM - Various	Records regarding events/projects/programmes	Electronic	A	Destroy	3 Years		3 Years	Records relating to specific events, i. e Heritage Open Day Registration forms - manual and	
Reports	HER/VM/JR/Reports	Briefing Reports, Trust reports, Cabinets Reports	Electronic	A	Destroy			6 Years	All records kept electronically	✓