

Surrey County Council Corporate Leadership Retention Schedule

Ref No	Description	Legal Basis	Retention	Action at End of Retention	Contains Personal Information	Protectively Marked?	Notes/Access
CLT1.0	Business Planning	-	-	-	-	-	-
CLT1.0.1	Directorate and Service Business Plans.	-	Current year + 3 years	Secure Disposal	N	Not Protectively Marked	-
CLT1.0.2	Records relating to business plan monitoring, corporate strategy plan monitoring, performance management monitoring created by individual directorate business information managers	-	Current year + 5 years then review	Offer to Archives	N	Not Protectively Marked	-
CLT2.0	Civic Functions	-	-	-	-	-	-
CLT2.0.1	Records relating to the recording and processing of applications to attend Royal Garden Parties	-	Current year + 2 years	Secure Disposal	Y	Official	-
CLT2.0.2	Records relating to management of a programme of civic and ceremonial events for the benefit of Surrey	-	Current year + 2 years	Secure Disposal	Y	Official	-
CLT3.0	Internal Communications	-	-	-	-	-	-
CLT3.0.1	Records relating to the management of records created by Members and County Leadership Team	-	Last action on file + 3 years then review	Offer to Archives	N	Official	-
CLT3.0.2	Leadership Office copies of responses to Members' questions	-	Current year + 3 years and then review	Offer to Archives	N	Official	-
CLT3.0.3	Files relating to the support given to Cabinet Portfolio Holders by their staff officers and support staff (held in paper, electronic including incoming and sent e-mail)	-	Current year + 1 year then review	Secure Disposal	N	Official	-
CLT3.0.4	Files relating to the support given to Executive Directors by their staff officers and support staff (held in paper, electronic including incoming and sent e-mail)	-	Current year + 3 years then review	Secure Disposal	N	Official	-
CLT3.0.5	Corporate Leadership Team Meeting/Other Management Team meeting minutes and papers where no corporate decisions are made and the meeting minutes will not be required as part of an audit trail	-	Date of meeting + 1 year then review	Secure Disposal	N	Official	-
CLT3.0.6	Corporate Leadership Team Meeting/Other Management Team meeting minutes and papers where no corporate decisions are made and the meeting minutes will be required as part of an audit trail	Limitation Act 1980 (Section 2)	Date of meeting + 6 years	Secure Disposal	N	Official	-
CLT3.0.7	Minutes and papers of meetings held outside Surrey County Council [where the member of staff attending the meeting is not the principal record keeper].	-	End of operational use	Secure Disposal	N	Official	-

Surrey County Council Corporate Leadership Retention Schedule

Ref No	Description	Legal Basis	Retention	Action at End of Retention	Contains Personal Information	Protectively Marked?	Notes/Access
CLT3.0.8	Corporate Policies and Procedures	-	Life of Policy + 3 years then review	Secure Disposal		Not Protectively Marked	-
CLT3.0.9	Directorate/Service policies and procedures	-	Life of Policy + 3 years then review	Secure Disposal		Not Protectively Marked	-
CLT4.0	Organisational Development	-	-	-	-	-	-
CLT4.0.1	Records relating to the restructuring of directorates or services	-	Year review completed + 6 years	Secure Disposal	N	Official	-
CLT4.0.2	Records relating to SCC strategic planning	-	Until superseded - but a copy should be offered to the Surrey History Centre	OFFER TO ARCHIVES	N	Not Protectively Marked	-
CLT4.0.3	Records relating to directorate and service strategic planning	-	Until superseded - but a copy should be offered to the Surrey History Centre	OFFER TO ARCHIVES	N	Not Protectively Marked	-
CLT5.0	Partnership & Agency Working	-	-	-	-	-	-
CLT5.0.1	Records relating to the constitution of partnerships and agreements with partners	Limitation Act 1980 (Section 2)	Life of partnership + 6 years	Offer to Archives	N	Official	-
CLT5.0.2	Service level agreements with partner organisations	-	Life of agreement + 6 years	Secure Disposal	N	Official	-
CLT5.0.3	Service Level Agreements with partner organisations in multi-occupancy buildings	Limitation Act 1980 (Section 2)	Life of the agreement + 6 years	Secure Disposal	N	Official	-
CLT5.0.4	Records relating to the management of partnership arrangements between SCC and its partners	Limitation Act 1980 (Section 2)	Life of partnership + 6 years then review	Offer to archives	N	Official	-
CLT5.0.5	Records relating to the management of the Warm Home Discount scheme	-	Current year + a minimum of 6 years	Secure Disposal	Y	Official	-
CLT6.0	Customer Service	-	-	-	-	-	-
CLT6.0.1	All records relating to the application for and award of Customer Service Excellence Awards	-	Date of award + 5 years	Offer to Archives	N	Not Protectively Marked	-
CLT6.0.2	Equality Impact Assessments – directorate operational copies	-	Operational use then Secure Disposal	Secure Disposal	N	Not Protectively Marked	-
CLT6.0.3	Equality Impact Assessments - Principal Copy	Race Relations (Amendment) Act 2000	Date updated + 3 years then review	Offer to Archives	N	Not Protectively Marked	-
CLT7.0	Public Consultations	-	-	-	-	-	-
CLT7.0.1	Records relating to responses to consultations	-	Date of response + 6 years	Secure Disposal	Y	Official	-
CLT8.0	Project Management	-	-	-	-	-	-
CLT8.0.1	Projects leading to a contract under seal	Limitation Act 1980 (Section 8)	Last action on the project + 12 years	Offer to Archives	N	Official	-
CLT8.0.2	Projects leading to a contract under signature	Limitation Act 1980 (Section 5)	Last action on the project + 6 years	Secure Disposal	N	Official	-
CLT8.0.3	Project files relating to projects which have received European or other external funding	-	Last action on project + length of time required by the funding body	Secure Disposal	N	Not Protectively Marked	-

Surrey County Council Corporate Leadership Retention Schedule

Ref No	Description	Legal Basis	Retention	Action at End of Retention	Contains Personal Information	Protectively Marked?	Notes/Access
CLT8.0.4	Project documentation created for internal projects which may not result in a contract	-	Last action on the project + 6 years	Secure Disposal	N	Not Protectively Marked	-
CLT8.0.5	Project files relating to research undertaken to see if projects are viable	-	End of operational use	Secure Disposal	N	Not Protectively Marked	-
CLT8.0.6	Correspondence which does not merit inclusion on the project files	-	Last action on project + 1 year	Secure Disposal	N	Not Protectively Marked	-
CLT8.0.7	Records created by Leadership Office to manage projects on behalf of Executive Directors; weeded for ephemera	-	Last action on project + 3 years then review	Offer to Archives	N	Not Protectively Marked	-
CLT8.0.8	Project documentation created as part of a project where the creator is not the project manager or designated record keeper for the project.	-	Life of Project	Secure Disposal	N	Official	-
CLT9.0	Returns to Central Government	-					-
CLT9.0.1	Returns to Central Government concerning the budget and financial strategy	-	Financial year + 6 years	Secure Disposal	N	Not Protectively Marked	-
CLT9.0.2	DfES returns for schools which have closed	-	Date school closed + 6 years	Secure Disposal	N	Not Protectively Marked	-
CLT9.0.3	Returns supplied to Central Government by the Looked After Children's Advisors	-	Date of return + 6 years	Secure Disposal	N	Not Protectively Marked	-
CLT9.0.4	LEA returns for schools which have closed	-	Date of return + 6 years	Secure Disposal	N	Not Protectively Marked	-
CLT9.0.5	National Indicator data relating to Local Bus Operators	-	Date of return + 10 years	Secure Disposal	N	Official - Sensitive	-
CLT9.0.6	Audit on School Meals Numbers taken on behalf of the School Food Trust	-	Date of return + 6 years	Secure Disposal	N	Not Protectively Marked	-