

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|----------------------------------|--|--------------------------------|---------------------------------------|-------------------------|---------------------|
| 19. Management | Management of corporate activities. Includes policies and procedures that apply to the Council as a whole. | | | | |
| Ceremonial | Ceremonial events. | | | | |
| Civic and royal events documents | Documentation relating to civic functions or visits by royalty to the local area. <ul style="list-style-type: none"> • Visitors books • Tapes • Photographs | Permanent - offer to archivist | RGLA 2.24 | Not protectively marked | |
| Civic and royal events planning | Information on planning and organising an event. | Destroy - 7 years after use | RGLA 2.25 | Not protectively marked | |
| Corporate gifts | Documentation relating to the provision of corporate gifts. | Permanent - offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Communication support | Supporting communication with and around the Council. | | | | |
| Interpreting and translation | Information about language translation services. | 6 years and destroy | CWAC retention based on good practice | Not protectively marked | |
| Mail processing | Processes connected with handling mail and associated communications. | 6 years and destroy | CWAC retention based on good practice | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|-------------------------|--|--------------------------------|---------------------------------------|-------------------------|---------------------|
| Publication | Guides, books and other publications that the council makes available on a chargeable basis. | Until superseded | CWAC retention based on good practice | Not protectively marked | |
| Publications received | Publications received by the council. | Until superseded | CWAC retention based on good practice | Not protectively marked | |
| Staff communications | Staff communication documentation. | Offer to archivist | CWAC retention based on good practice | Protect | |
| Corporate communication | Communication with the public. | | | | |
| Campaigns | Documentation relating to the promotion of a business through publicity campaigns. | 2 years and destroy | CWAC retention based on good practice | Not protectively marked | |
| Corporate branding | Documentation relating to the process of creating and the use of a corporate image and relevant guidance within the authority. | 3 years and offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Corporate publicity | Documentation relating to corporate publicity. | Until superseded | CWAC retention based on good practice | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--|---|---|---------------------------------------|-------------------------|--|
| Graphic design | Documentation relating to graphic design requirements of the authority. | Destroy - 3 years from last action | RGLA 2.19 | Not protectively marked | |
| Market research data identifiable individuals | Market research data relating to identifiable individuals <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 6 months | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research data statutory identifiable individuals | Market research data relating to identifiable individuals and part of a statutory survey <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 2 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research data major policies identifiable individuals | Market research data relating to identifiable individuals and part of a survey which influenced a major policy <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 5 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--|---|---|---------------------------------------|--------------|--|
| Market research data grant funded identifiable individuals | Market research data relating to identifiable individuals and part of a survey which was grant funded <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 5 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research data non identifiable individuals | Market research data relating to non identifiable individuals <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 6 months | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research data statutory non identifiable individuals | Market research data relating to non identifiable individuals and part of a statutory survey <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 2 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research data major policies non identifiable individuals | Market research data relating to non identifiable individuals and part of a survey which influenced a major policy <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 5 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--|--|--|---------------------------------------|-------------------------|--|
| Market research data grant funded non identifiable individuals | Market research data relating to non identifiable individuals and part of a survey which was grant funded <ul style="list-style-type: none"> • Quantitative Research e.g. surveys • Qualitative Research e.g. focus groups | Completion of data analyses plus 5 years | CWAC retention based on good practice | Confidential | Research, Intelligence and Consultation Team |
| Market research analyses | The aggregated data and analyses from market research data. | Completion of analyses plus 5 years | CWAC retention based on good practice | Protect | Research, Intelligence and Consultation Team |
| Market research reports | The reports compiled from the aggregated data and analyses from market research data. | Completion of analyses plus 5 years (unless example of best practice then 10 years and review) | CWAC retention based on good practice | Protect | Research, Intelligence and Consultation Team |
| Marketing | Documentation relating to the marketing of the council or a specific function or service. <ul style="list-style-type: none"> • Marketing campaigns | Permanent - offer to archivist | RGLA 2.23 | Not protectively marked | |
| Media cuttings | Compilation of media in which the local area or authority is mentioned. | Permanent - offer to archivist | RGLA 2.22 | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--------------------------------------|---|--|---------------------------------------|-------------------------|---------------------|
| Media liaison | Documentation relating to liaison between the council and local media. | Destroy - 3 years from closure | RGLA 2.21 | Not protectively marked | |
| Media releases | Information released to the media. | Permanent - offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Media releases promotion of business | Documentation relating to media releases for the promotion of business. | Permanent - offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Public relations | Documentation relating to public relations. | Until superseded | CWAC retention based on good practice | Not protectively marked | |
| Public relations | Media reports. | Permanent - offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Public relations | Published work. | Destroy after use is concluded - one copy to archive | RGLA 2.20 | Not protectively marked | |
| Public relations | Statistics. <ul style="list-style-type: none"> • Trends • Customer satisfaction | Destroy - 10 years after use concluded | CWAC retention based on good practice | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|------------------------------------|---|--------------------------------|---------------------------------------|--------------|---------------------|
| Enquiries and complaints | Enquiries and complaints to the Council. | | | | |
| Appeals | Formal complaints received and response to the complaint. Includes the FOI, EIR and data protection complaints process. | Current year plus 6 | CWAC retention based on good practice | Confidential | |
| Complaints | Complaints which result in significant changes of policy. <ul style="list-style-type: none"> • Reports • Correspondence | Permanent - offer to archivist | RGLA 2.14 | Confidential | |
| Complaints | Summary form of complaints. <ul style="list-style-type: none"> • Registers | Permanent - offer to archivist | RGLA 2.13 | Confidential | |
| Complaints | Identification of a specific complaint to the council. | Current year plus 6 | CWAC retention based on good practice | Confidential | |
| Complaints | Identification of a specific complaint to the council. | Current year plus 6 | CWAC retention based on good practice | Confidential | |
| Complaints to Ombudsman | Documents related to Ombudsman complaints. | Current year plus 6 | CWAC retention based on good practice | Confidential | |
| Complaints to Ombudsman negligence | Documents related to Ombudsman complaints where negligence is involved. | Review after 15 years | CWAC retention based on good practice | Confidential | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|-----------------------|--|--|---------------------------------------|-------------------------|---------------------|
| Compliments | Compliments and comments and response received and response to them. | Destroy after 1 year | CWAC retention based on good practice | Not protectively marked | |
| Customer profiling | Information provided by an individual or organisation that includes personal preferences. | Review after 1 year | CWAC retention based on good practice | Protect | |
| Customer satisfaction | Feedback on council performance in relation to services or other aspects of council business. <ul style="list-style-type: none"> Customer satisfaction surveys | Review after 5 years | CWAC retention based on good practice | Not protectively marked | |
| Stage 1 complaints | Documents related to stage 1 complaints. | Destroy - 2 years after use is concluded | RGLA 2.16 | Confidential | |
| Stage 2 complaints | Documents related to Stage 2 complaints. | Destroy - 6 years after use is concluded | RGLA 2.15 | Confidential | |
| External audits | The external activities (usually carried out by district audit) associated with officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the organisation in a specified period. | | | | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--|--|--|---------------------------------------|-------------------------|---------------------|
| Audits | Documentation on audits. | Destroy after 7 years | CWAC retention based on good practice | Protect | |
| Preparing business | Preparing business | | | | |
| Meetings | Information regarding meetings. Protection should be relevant to sensitivity of meeting. <ul style="list-style-type: none"> • Agendas • Meetings | Current year plus 5. Information from significant meetings should be offered to archivist. | CWAC retention based on good practice | Protect | |
| Officer representation | Documentation relating to officer representation. | Destroy after 3 years | CWAC retention based on good practice | Not protectively marked | |
| Partnership and agency working LA record | Documentation relating to agency working where local authority owns the record. | Permanent - offer to archivist | RGLA 1.6 | Not protectively marked | |
| Partnership and agency working Non LA record | Documentation relating to agency working where local authority does not own the record. | Destroy - 3 years after last action | RGLA 1.7 | Protect | |
| Project management | Activities organised into projects. | | | | |
| Closure | Information obtained by reviewing the project. <ul style="list-style-type: none"> • Lessons learned | 5 years and review | CWAC retention based on good practice | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--------------------------|--|--------------------------------|---------------------------------------|-------------------------|---------------------|
| Governance | Document created at the start of the project to indicate how it will be run. <ul style="list-style-type: none"> Project Initiation Document (PID) | 5 years and review | CWAC retention based on good practice | Not protectively marked | |
| Governance | Planning documentation. <ul style="list-style-type: none"> Unit or Team plans | 5 years and review | CWAC retention based on good practice | Not protectively marked | |
| Initiation and delivery | Unforeseen events requiring action. | 5 years and review | CWAC retention based on good practice | Not protectively marked | |
| Start up | Information related to planning a business operation or service. <ul style="list-style-type: none"> Business plan | 5 years and review | CWAC retention based on good practice | Not protectively marked | |
| Quality and performance | Information on quality and performance. | | | | |
| Assessments | Assessments | Destroy - 2 years from closure | RGLA 2.18 | Protect | |
| CAA & Best Value Reviews | CAA Reviews. Previously best value reviews. | Destroy - 5 years from closure | RGLA 2.17 | Protect | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|----------------------------------|---|--------------------------------|---------------------------------------|----------|---------------------|
| Inspections | Documentation relating to the external inspections received by the authority in relation to corporate or service specific performance management. | 5 years and review | CWAC retention based on good practice | Protect | |
| Process mapping | Information relating to specific quality initiatives such as ISO 9000. | 5 years and review | CWAC retention based on good practice | Protect | |
| Benchmarking | | Destroy - 5 years from closure | CWAC retention based on good practice | Protect | |
| Data Quality | Documents relating to data quality | Destroy - 5 years from closure | CWAC retention based on good practice | Protect | |
| Performance Management Framework | Documents relating to the performance management framework | Destroy - 5 years from closure | CWAC retention based on good practice | Protect | |
| Statutory returns | The process of preparing information to be passed on to central government as part of statutory requirements | | | | |
| Reports to government | Reports to government | Destroy - 7 years from closure | RGLA 2.5 | Protect | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--------------------------|--|---|---------------------------------------|-------------------------|---------------------|
| National Indicator Set | Documents relating to reporting to government on National Indicators | Destroy - 5 years from closure | CWAC retention based on good practice | Not protectively marked | |
| Strategic planning | Information related to planning a business operation or service. | | | | |
| Business cases | Information related to identifying a need or requirement for a business or service process. | Destroy after 6 years | CWAC retention based on good practice | Protect | |
| Corporate initiatives | Documentation relating to corporate initiatives. | Destroy - 5 years after initiative ends | CWAC retention based on good practice | Protect | |
| Organisational structure | Organisational structure of the council. <ul style="list-style-type: none"> Structure plans | Permanent – offer to archivist | CWAC retention based on good practice | Not protectively marked | |
| Policies and procedures | Documentation relating to policies and procedures of the council. | Permanent - offer to archivist | RGLA 2.6 | Not protectively marked | |
| Public consultation | The process of consultation with the public on minor policies. | Destroy - 1 year from closure | RGLA 2.9 | Not protectively marked | |

| Heading | Example/Description of Record | Recommended Retention Period | Authority | Security | Prime Record Holder |
|--------------------------|--|--|-----------|-------------------------|---------------------|
| Public consultation | The process of consultation with the public on significant policies. | Destroy - 5 years from closure | RGLA 2.8 | Not protectively marked | |
| Service level agreements | Information relating to agreements made between separate internal units or teams on a contractual basis. | Destroy 2 years after the term of the contract has expired | RGLA 4.13 | Not protectively marked | |