

# RCOG Records Management: Records Classification and Retention Schedule

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## Clinical Quality

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Published guidelines, impact papers, opinion paper, patient information and reports	Send to Archive for permanent retention	Time of publication	College publications	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Project papers, including draft reports and guidelines and patient information	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis	Cross-College projects	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Literature searches for guidelines	Delete/destroy either locally or send to semi-active store	Time of update	NGA	Royal Medical Colleges common practice
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Peer reviews and correspondence relating to guidelines and patient information development	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis	NGA	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Signed contracts and agreements; commissioning letters	Send to Archive for permanent retention	At end of active use	Legal records NGA	Legal accountability
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Correspondence and administrative papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity

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Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Statistics and research papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis	NGA Cross-College projects	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Working drafts of guidelines, reports and patient information etc	Destroy all draft copies	Time of publication or review after a year	NGA	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Declarations of interest forms/tables	Destroy	Time of update	NGA	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Guidelines and evidence-based standards <b>CQ11</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention	At end of active use; review on regular yearly basis	Committees	Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Individual and Trust Reviews <b>CQ12</b>	All papers	Transfer to Records Manager and review 6 years after transfer	At end of active use		Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Clinical Quality Team <b>CQ13</b>	Team administrative papers, correspondence and templates	Destroy outdated and unnecessary files	Review on regular yearly basis	Team administration	Business activity
Clinical Quality	Clinical Quality	Clinical Quality Team	Expense forms	Destroy	End of relevant project	Committees and groups	
Clinical Quality	Clinical Quality	Clinical Quality Team	Photographs of team members	Destroy within 3 months of active use	Review quarterly	N/A	

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Clinical Quality	Clinical Quality	Clinical Quality Team	Job applications, applicant details, interview notes	Destroy within 3 months of interview date	Review quarterly	N/A	
Clinical Quality	Clinical Quality	Clinical Quality Team	Staff contact details, electronic signatures	Destroy within 3 months of active use	Review quarterly	HR	
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Lindsay Stewart Centre projects <b>CQ14</b>	Research papers, survey papers, and related correspondence	Transfer to Records Manager and review 5 years after transfer	At end of active use		Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Lindsay Stewart Centre projects <b>CQ14</b>	Policy papers, guidance, agreements and procedure	Send material of corporate and historical value to Archives; delete/destroy any outdated and unneeded files	Review on regular yearly basis		Business activity
Clinical Quality <b>CQ</b>	Clinical Quality <b>CQ1</b>	Lindsay Stewart Centre projects <b>CQ14</b>	Data collected in the course of projects	Transfer to Records Manager on completion of project and review 5 years after transfer	At end of project		Statutory Limitation Period – an alternative minimum retention period may be set by the research sponsor
Clinical Quality	Clinical Quality	Lindsay Stewart Centre projects	Person identifiable data in clinical records	Delete immediately	Once no longer needed for linkage	N/A	
Clinical Quality	Clinical Quality	Lindsay Stewart Centre projects	Patient level clinical records (containing sensitive data)	Delete after 5 years	End of project	N/A	5 years necessary in order to respond to queries re project results

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Clinical Quality	Clinical Quality	Lindsay Stewart Centre projects	Signed contracts and agreements; commissioning letters	Send to Archive for permanent retention	At end of active use	Governance	Legal accountability
Clinical Quality	Clinical Quality	Clinical Quality team	Bids	Send to Archive for permanent retention	At end of active use	N/A	
Clinical Quality CQ	Clinical Quality CQ1	Public correspondence	Folder of public correspondence	Destroy after 5 years	Annual review and deletion		Business activity

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## Committees and Groups

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee membership <b>COM11</b>	Appointments, committee lists and honorariums	Transfer to Records Management for destruction after 2 years	Review on regular yearly basis		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee membership <b>COM11</b>	Chair payments	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	Review on regular yearly basis		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee membership <b>COM11</b>	Expense forms	Retain locally and destroy	Transfer to Finance		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee papers <b>COM12</b>	Chair's correspondence and papers	Transfer to Records Management for review after 1 year	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee papers <b>COM12</b>	Confirmed and signed minutes	Send to Archive for permanent retention	At end of active use		All audio recordings of committee meetings would need to be deleted once the meeting minutes have been approved (SMG Meeting 26/07/16)
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee papers <b>COM12</b>	Agenda and circulated papers	Send to Archive for permanent retention	At end of active use		

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<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee papers <b>COM12</b>	Terms of reference	Send to Archive for permanent retention	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Committee papers <b>COM12</b>	Submissions to Council/Annual Report etc	Retain locally and destroy	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Team and routine correspondence	Retain locally and destroy	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Room bookings and meeting admin	Retain locally and destroy	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Contact details, electronic signatures and templates	Retain locally and destroy	At end of active use		Data Protection Policy
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Declarations of interest and good standing	Retain locally and destroy after 5 years	End of committee membership		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Green Charter	Send to Archive for permanent retention	Time of publication		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Final agreements and policies	Send to Archive for permanent retention	At end of active use		
Committees and Groups <b>COM</b>	All committees and groups <b>COM1</b>	Administration <b>COM13</b>	Background notes and papers	Retain locally and destroy	At end of active use		

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Committees and Groups <b>COM</b>	Wellbeing of Women Trustees <b>COM2</b>	Trustee meetings <b>COM21</b>	Agenda and circulated papers	Transfer to Records Management for review after 2 years	At end of active use	Council papers	May be duplicated in Council papers



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## Development Directorate – NGA

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Development Directorate	NGA	Live guidelines	Committees: Audio recordings in GC meetings	Retain locally to support the project managers and reviewers to write up minutes of GC meetings and rational & impact/committee discussion sections of the guideline	Sign off of minutes of previous GC meeting (this will happen at subsequent GC meeting)	Committees: Meetings	Historical value/Business need
Development Directorate	NGA	Live guidelines / Completed guidelines	Committees: Meetings - Administrative records: attendee list, meeting schedules, correspondence	Retain locally and destroy when reference value ceases	At end of active use; Time of update to NICE contract and NICE Retention and Disposal Policy	Committee admin	Historical value/Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Live guidelines / Completed guidelines	Committees: Recruitment – Successful candidates – application form/CV/test results/certificates/interview notes, references, job description, person specification	Retain locally and destroy 6 years following termination of employment. <b>(TBC – awaiting update to NICE)</b>	Review quarterly; Time of update to NICE contract and NICE Retention and Disposal Policy	Committee admin	Historical value/Business need (instructions are to be included in NICE Retention and Disposal Policy V1)

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				<b>Retention and Disposal Policy V1)</b>			
Development Directorate	NGA	Live guidelines / Completed guidelines	Committees: Recruitment – Unsuccessful candidates – application form, CV, test results, certificates, interview notes, sift form	Retain locally and destroy 6 months following completion of appointment interview ( <b>TBC – awaiting update to NICE Retention and Disposal Policy V1)</b>	Review monthly; Time of update to NICE contract and NICE Retention and Disposal Policy	Committee admin	Historical value/Business need (instructions are to be included in NICE Retention and Disposal Policy V1)
Development Directorate	NGA	Live guidelines / Completed guidelines	Guidance: Scope, consultation comments, recommendations health economic models and plans, evidence tables, search audit trails, excluded studies tables, substantive correspondence. <b><i>This list is not exhaustive and applies to all records created in the course of producing guidelines unless otherwise stated elsewhere in this schedule.</i></b>	<ul style="list-style-type: none"> <li>Final/published versions: retain locally for permanent retention</li> <li>Major versions/drafts and other substantive records: retain locally for permanent retention and review on guideline update (full or</li> </ul>	Time of publication; Time of update to NICE contract and NICE Retention and Disposal Policy	Policy Development – NICE Guidelines Manual	Historical value/Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)

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				<p>partial update)</p> <ul style="list-style-type: none"> <li>Minor versions/drafts and other transitory records: delete on guideline publication</li> </ul>			
Clinical Development Directorate	NGA	Live guidelines / Completed guidelines	Management: Stakeholder management - name of individual, email address, telephone number.	Retain locally for permanent retention and destroy 5 years after individuals last involvement with NICE business	Review quarterly; Time of update to NICE contract and NICE Retention and Disposal Policy	Committee admin	<p>Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)</p> <p>The 5 year retention period is based around the 4 year cycle of guidance updates - if stakeholder data relating to an individual was deleted sooner, we risk deleting the information of an individual stakeholder (as opposed to organisation) who must be contacted as part of the guidance review process. However if a stakeholder has had no substantive involvement with</p>

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							<p>NICE business in 5 years this would likely indicate their information is no longer up to date or they no longer wish to be involved with NICE.</p> <p>Note - this data is often held in multiple locations for example systems such as the contacts database or in spreadsheets, outlook etc.</p>
Development Directorate	NGA	Live guidelines / Completed guidelines	Raw data: Copyright cleared/free-to-access articles held outside of Eppi (electronic; included and excluded)	Retain locally and submit as part of MDS on publication of guideline, then destroy.	MDS submission; Time of update to NICE contract and NICE Retention and Disposal Policy	MDS	Historical value/business activity
Development Directorate	NGA	Live guidelines / Completed guidelines	Raw data: Copyright cleared articles (paper; included and excluded)	Retain locally and destroy on publication on guideline	Review quarterly; Time of update to NICE contract and NICE Retention and Disposal Policy		Historical value/business activity
Development Directorate	NGA	Live guidelines / Completed guidelines	Raw data: Non-copyright cleared articles (paper and electronic; included and excluded)	Review quarterly; Retain locally or send to Records Manager and	Review quarterly; Time of update to NICE contract and NICE Retention and		Historical value/business activity

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				destroy 6 months after guideline publication	Disposal Policy		
Development Directorate	NGA	Administration and Governance	Agreements: Agreements and contract negotiations	Transfer to Records Management for destruction or retain locally and destroy after 5 years	Expiry of contract	Legal records	Business need
Development Directorate	NGA	Administration and Governance	Agreements: Signed contracts and amended agreements	Send to Archives and review 2 years after agreement ceases	At end of active use	Legal records	Business need
Development Directorate	NGA	Administration and Governance	Directors files <ul style="list-style-type: none"> <li>• Day files</li> <li>• Invitations to meetings and events</li> </ul>	Transfer to Records Management for destruction or retain locally and destroy after 5 years	At end of active use		Business need
Development Directorate	NGA	Administration and Governance	Directors files <ul style="list-style-type: none"> <li>• Correspondence</li> <li>• Policy files</li> <li>• Planning files</li> </ul>	Transfer to Records Management for destruction or retain locally and destroy after 5 years	At end of active use		Business need
Development Directorate	NGA	Administration and Governance	Financial management: Annual reports	Retain locally for 2 years then send to Archives	Review end of financial year	Committee admin	Companies Act 2006 for working papers RM CoP for H&SC 2016 (kept for a

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							period consistent with NICE's Retention and Disposal Policy V1).
Development Directorate	NGA	Administration and Governance	Financial management: Audit report, correspondence	Retain locally for 2 years then send to Records management and destroy 7 years after end of year records relate to	Review end of financial year	Committee admin	6 years statutory under the Companies Act, VAT Act & Finance Act, with additional year 'safety' period in case of HMRC enquiry (kept for a period consistent with NICE's Retention and Disposal Policy V1).
Development Directorate	NGA	Administration and Governance	Financial management: Capital expenditure (calculations, correspondence); Expenses (travel and subsistence claims); Financial accounting (accounts payable/receivable, invoices, purchase orders, receipts); Management accounting (budgets); Reconciliation and balance management (year end balances, reconciliations and variations to support ledger balances); VAT/Tax return	Retain locally for 2 years then send to Records management and destroy 7 years after end of year records relate to	Review end of financial year	Committee admin	6 years statutory under the Companies Act, VAT Act & Finance Act, with additional year 'safety' period in case of HMRC enquiry (kept for a period consistent with NICE's Retention and Disposal Policy V1).
Development Directorate	NGA	Administration and Governance	Financial management: Transaction processing (bank deposit, statements, petty cash)	Retain locally and destroy 2 years after end of year in which action was completed	Review on regular yearly basis; Time of update to NICE contract and NICE	Committee admin	Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)

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					Retention and Disposal Policy		
Development Directorate	NGA	Administration and Governance	Job applications, applicant details, interview notes	Retain locally and give to HR at end of active use	At end of active use		Business need
Development Directorate	NGA	Administration and Governance	Planning <ul style="list-style-type: none"> <li>Annual Business Plans and Reports</li> <li>Quarterly Review meeting papers</li> </ul>	Retain locally or send to Archives for permanent retention	At end of active use	Senior management team files	Business need
Development Directorate	NGA	Administration and Governance	Policy Development: NICE Guidelines Manual, process guides	Retain locally. If manual/guide becomes obsolete retain locally or send to Records Management for 10 years then review	Review after 10 years then review; Time of update to NICE contract and NICE Retention and Disposal Policy	Live guidelines and Published guidelines	Historical value / business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Administration and Governance	Policy Development: Templates	Retain locally and destroy once template becomes obsolete	At end of active use; Time of update to NICE contract and NICE Retention and Disposal Policy	Live guidelines and Published guidelines	Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Clinical Development	NGA	Administration and Governance	Records of enquiries	Retain locally or transfer to Records	At end of active use		Business need

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Directorate				Management for destruction and destroy after 2 years			
Development Directorate	NGA	Administration and Governance	Staff contact details	Retain locally and destroy 6 months following completion of appointment	At end of active use		Data Protection
Development Directorate	NGA	Methodology	System of methods used in all technical areas.	Retain locally and destroy when reference value ceases	At end of active use	Live guidelines and Published guidelines	Business need
Development Directorate	NGA	Projects, project management	Substantive project records e.g. Business case, final report, project implementation doc, post implementation review	Retain locally or send to Records Manager and review 5 years after project completed. Review any material retained on an annual basis.	At end of active use; Time of update to NICE contract and NICE Retention and Disposal Policy V1		Historical value / Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Projects, project management	All other documents emanating from the project e.g. Implementation plan, highlight report, project brief, risk assessment, process analysis and design, project plan, issue log	Retain locally and destroy 1 year after project complete	At end of active use; Time of update to NICE contract and NICE Retention and Disposal Policy V1		Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Senior management files	Performance/activity reports, KPIs, statistics	Retain locally and destroy 2 years after the	Review quarterly; Time of update		Business need (kept for a period consistent with



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Directorate				end of the year to which records relate	to NICE contract and NICE Retention and Disposal Policy		NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Senior management files	Reporting: Team annual reports, statistics, working papers	Retain locally and review 5 years after end of year records relate to	Review quarterly; Time of update to NICE contract and NICE Retention and Disposal Policy		Historical value / Business need (kept for a period consistent with NICE's Retention and Disposal Policy V1)
Development Directorate	NGA	Standard operating procedures (SOPs)	Processes to ensure services and/or products are delivered consistently.	Retain locally and destroy when reference value ceases	At end of active use		Business need

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## Education

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Education <b>ED</b>	ATSM Management <b>ED1</b>	Policy and procedure <b>ED11</b>	Committee papers – see Committees and Groups	Retain Permanently			
Education <b>ED</b>	ATSM Management <b>ED1</b>	Policy and procedure <b>ED11</b>	Statistics and papers supplied to Specialty Education Advisory Committee	Retain locally and destroy	Review on regular yearly basis		Duplicated in SEAC files
Education <b>ED</b>	ATSM Management <b>ED1</b>	Administration <b>ED12</b>	Trainee files	Transfer to Records Management for review after 7 years	At end of active use		Data Protection Trainee management <b>Add names to masterlist and delete once destruction has taken place</b> (also includes files of trainees who have been recommended to the GMC for award of CCT/CESR.
Education <b>ED</b>	ATSM Management <b>ED1</b>	Administration <b>ED12</b>	Templates and working files	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Education <b>ED</b>	ATSM Management <b>ED1</b>	Administration <b>ED12</b>	Officer applications and invitations	Retain locally and destroy	Review on regular yearly basis		Data Protection  Business activity
Education <b>ED</b>	Certification of Completion of Training	CCT/CESR(CP) <b>ED21</b>	See ATSM Management for records retention	Retain for 7 years			

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	<b>ED2</b>						
Education <b>ED</b>	Certification of Completion of Training <b>ED2</b>	CESR <b>ED22</b>	Meeting papers and assessment forms	Send to Archive for permanent retention	At end of active use		
Education <b>ED</b>	Certification of Completion of Training <b>ED2</b>	CESR <b>ED22</b>	Successful CESR applications and papers	Retain locally and destroy	At end of 6 month		Information held by GMC
Education <b>ED</b>	Certification of Completion of Training <b>ED2</b>	CESR <b>ED22</b>	Unsuccessful CESR applications and papers	Retain locally and destroy	At end of 3 years		Retention period reduced from 3 years to 1 year June 2015
Education <b>ED</b>	E-learning <b>ED3</b>	Administration <b>ED31</b>	STRATOG final course material	Send to Archive for permanent retention	Time of publication		Business activity
Education <b>ED</b>	E-learning <b>ED3</b>	Administration <b>ED31</b>	STRATOG correspondence, peer reviews and working files	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	At end of active use		Business activity
Education <b>ED</b>	E-learning <b>ED3</b>	Administration <b>ED31</b>	Copyright permissions and authorisations	Send to Archive for permanent retention	At end of active use		Business activity
Education <b>ED</b>	E-learning <b>ED3</b>	Administration <b>ED31</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention	At end of active use		Business activity
Education <b>ED</b>	E-learning <b>ED3</b>	Marketing <b>ED32</b>	See Fundraising and Development – Marketing				

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Education <b>ED</b>	E-portfolio <b>ED4</b>	Policy and procedure <b>ED41</b>	Signed contracts and agreements	Send to Archive for permanent retention	At end of active use		Business activity
Education <b>ED</b>	E-portfolio <b>ED4</b>	Policy and procedure <b>ED41</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Education <b>ED</b>	E-portfolio <b>ED4</b>	Policy and procedure <b>ED41</b>	Project papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Education <b>ED</b>	E-portfolio <b>ED4</b>	Administration <b>ED42</b>	Correspondence and working files	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Education <b>ED</b>	E-portfolio <b>ED4</b>	Administration <b>ED42</b>	E-portfolio records of individuals on the programme	Retain locally and destroy after 7 years	Withdrawal from the E-portfolio programme	CPD records	
Education <b>ED</b>	Trainee management <b>ED5</b>	Policy and procedure <b>ED51</b>	Trainee data and statistics	Send to Archive for permanent retention; destroy personal data			Business activity Personal Data
Education <b>ED</b>	Trainee management <b>ED5</b>	Policy and procedure <b>ED51</b>	Trainee information and guides	Send to Archive for permanent retention			Business activity
Education <b>ED</b>	Trainee management <b>ED5</b>	Policy and procedure <b>ED51</b>	Visiting procedures and centre criteria	Send to Archive for permanent retention			Business activity

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Education <b>ED</b>	Trainee management <b>ED5</b>	Administration <b>ED52</b>	Questionnaire and survey papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Education <b>ED</b>	Trainee management <b>ED5</b>	Administration <b>ED52</b>	Administrative papers and correspondence	Retain locally and destroy	Review on regular yearly basis		
Education <b>ED</b>	Trainee management <b>ED5</b>	Administration <b>ED52</b>	Templates and working papers	Retain locally and destroy	Review on regular yearly basis		
Education <b>ED</b>	Trainee management <b>ED5</b>	Administration <b>ED52</b>	Subspecialty Training Centre files	Send to Archive for permanent retention; delete or destroy personal records and CVs and administrative papers			
Education <b>ED</b>	Curriculum <b>ED6</b>	Policy and procedure <b>ED61</b>	All published versions of core, subspecialty, ATSM and academic curricula approved by GMC	Send to Archive for permanent retention		All published versions of workplace-based assessments approved by GMC	Assessment Lead
Education <b>ED</b>	Curriculum <b>ED6</b>	Policy and procedure <b>ED61</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention		Committees and Groups	

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Education <b>ED</b>	Curriculum <b>ED6</b>	Administration <b>ED62</b>	Administrative papers and correspondence	Retain locally and destroy	Review on regular yearly basis		
Education <b>ED</b>	Curriculum <b>ED6</b>	Administration <b>ED62</b>	Submissions to GMC <b>E</b>	Send to Archive for permanent retention			
Education <b>ED</b>	Education Quality <b>ED7</b>	Policy and procedure <b>ED71</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention			
Education <b>ED</b>	Education Quality <b>ED7</b>	Policy and procedure <b>ED71</b>	Records of the Externality scheme	Send to Archive for permanent retention; delete or destroy personal records and CVs			
Education <b>ED</b>	Education Quality <b>ED7</b>	Policy and procedure <b>ED71</b>	Annual Specialty Report to GMC	Send to Archive for permanent retention			
Education <b>ED</b>	Education Quality <b>ED7</b>	Administration <b>ED72</b>	Administrative papers and correspondence	Send material of corporate and historical value to Archives; delete any outdated and unneeded files			
Education <b>ED</b>	Revalidation <b>CQ2</b>	Policy and procedure <b>CQ21</b>	Policy papers, guidance and procedure	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Education	Revalidation <b>CQ2</b>	Policy and procedure <b>CQ21</b>	CPD guides and procedures	Send to Archive for permanent retention	Review on regular yearly basis		
<b>ED</b>	Revalidation <b>CQ2</b>	Policy and procedure <b>CQ21</b>	Membership surveys – see Membership-member surveys				
Education	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Working papers and correspondence	Retain locally and destroy	At end of active use		
<b>ED</b>	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Subscriptions and payments	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		This relates to legacy files only as these records are now kept on Integra.
Education	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Templates and administrative papers	Retain locally and destroy	Review on regular yearly basis		
<b>ED</b>	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Correspondence files	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Education	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Revalidation advice enquiries	Retain locally and destroy after 2 years	Review on regular yearly basis		
<b>ED</b>	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	Helpdesk management papers	Retain locally and destroy	Review on regular yearly basis		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Education	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	CPD registration records	Retain locally and destroy after 5 years	Time of completion		
<b>ED</b>	Revalidation <b>CQ2</b>	Administration <b>CQ22</b>	CPD event files	Send to Archive for permanent retention	Review on regular yearly basis		This relates to legacy files only as these records are now kept on Integra.



# RCOG Records Management: Records Classification and Retention Schedule

## Events and Conferencing

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Event papers <b>EVC11</b>	Abstracts and feedback	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Event papers <b>EVC11</b>	Delegate papers and course material	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Event papers <b>EVC11</b>	Invitations and posters	Send to Archive for permanent retention	Review on regular yearly basis	Annual Christmas Lecture; children's poster competition	Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Event papers <b>EVC11</b>	Photographs of events, conferences and study groups	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
<i>Events and conferencing <b>EVC</b></i>	<i>Educational events and conferencing, including Special Societies</i>	<i>Event papers <b>EVC11</b></i>	<i>Signed photograph consent forms</i>	<i>Transfer to Records Management for review after 6 years or retain for life of photograph</i>	<i>Time of publication</i>	<i>Clinical Guidance</i>	<i>Higher education institutions and schools general policy</i>

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
	<b>EVC1</b>						
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Committee papers	See Committees and Groups				
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Draft budgets	Retain locally and destroy	Review on regular yearly basis		Financial activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Final budget	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Templates	Retain locally and destroy	At end of active use		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Conference feedback summary	Send to Archive for permanent retention	Review on regular yearly basis		Business activity

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Policy and non-administrative correspondence	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Papers relating to sponsors and exhibits	Retain locally and destroy	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Expenses	Retain locally and destroy	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Strategy final papers	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Video Conferencing Agreements: signed and completed	Send to Archive for permanent retention	At end of active use		Legal

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Joint meetings agreements	Send to Archive for permanent retention	At end of active use		Legal
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Administrative papers	Retain locally and destroy	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Attendance forms and delegate lists	Retain locally and destroy	At end of active use		Data Protection
Events and conferencing <b>EVC</b>	Educational events and conferencing, including Special Societies <b>EVC1</b>	Administration <b>EVC12</b>	Registration slips	Retain locally and destroy	At end of active use		Data Protection
Events and conferencing <b>EVC</b>	College social events and outside bookings <b>EVC2</b>	Administration <b>EVC21</b>	Social events files	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	At end of active use		Business activity

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Events and conferencing <b>EVC</b>	College social events and outside bookings <b>EVC2</b>	Catering and cleaning <b>EVC22</b>	Function sheets including catering details and menus	Retain locally and destroy	2 years after creation		Business activity
Events and conferencing <b>EVC</b>	College social events and outside bookings <b>EVC2</b>	Catering and cleaning <b>EVC22</b>	Feedback on catering from Meetings team	Retain locally and destroy	2 years after creation		Business activity
Events and conferencing <b>EVC</b>	College social events and outside bookings <b>EVC2</b>	Catering and cleaning <b>EVC22</b>	Contracts	Transfer to Records Management for review after 10 years	Review on regular yearly basis		Business activity
Events and conferencing <b>EVC</b>	Educational and social events <b>EVC3</b>	Committees <b>EVC31</b>	Information copies of College meetings	Retain locally and destroy	At end of active use		Business activity Original copies of meeting notes and minutes to be sent to Archive

# RCOG Records Management: Records Classification and Retention Schedule

## Examinations

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Examinations <b>EX</b>	Examination <b>EX1</b>	Policy and procedure <b>EX11</b>	Signed contracts and agreements	Send to Archive for permanent retention	At end of active use	Legal records and contracts	Business activity
Examinations <b>EX</b>	Examination <b>EX1</b>	Policy and procedure <b>EX11</b>	Meeting agenda, circulated papers and minutes	Send to Archive for permanent retention	At end of active use	Committees and Groups	Business activity
Examinations <b>EX</b>	Examination <b>EX1</b>	Policy and procedure <b>EX11</b>	Curriculum development correspondence and papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Examinations <b>EX</b>	Examination <b>EX1</b>	Policy and procedure <b>EX11</b>	Working party papers and reports	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis	Committees and Groups	Business activity
Examinations <b>EX</b>	Examination <b>EX1</b>	Administration <b>EX12</b>	Examination papers	Send to Archive for permanent retention	At end of active use		Business activity May be retained in local records
Examinations <b>EX</b>	Examination <b>EX1</b>	Administration <b>EX12</b>	Examination results/pass lists	Retain locally	Review on regular yearly basis		JISC Higher Education Business Classification Scheme and Retention Schedule recommends,

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
							completion of programme +10 years and destroy
Examinations <b>EX</b>	Examination <b>EX1</b>	Administration <b>EX12</b>	Project papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Examinations <b>EX</b>	Examination <b>EX1</b>	Administration <b>EX12</b>	Correspondence and administrative papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Examinations <b>EX</b>	Examination <b>EX1</b>	Administration <b>EX12</b>	Team administrative papers and templates	Retain locally and destroy	Review on regular yearly basis		

# RCOG Records Management: Records Classification and Retention Schedule

## Finance

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Revenue invoices	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Capital invoices	Transfer to Records Management for destruction or destroy locally at end of financial year plus 10 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Budget papers	Retain locally and destroy	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Audit papers	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Finance reports	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		Financial protocols



## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Management accounts	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Bank statements and paying-in records	Retain locally and destroy at end of 2 years	End of financial year		Financial protocols National Archives
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Income tax and NI returns	Retain locally and destroy after 3 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Receipts cash book & sales ledger	Transfer to Records Management for destruction or destroy locally at end of financial year plus 6 years	End of financial year		Financial protocols National Archives
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Taxation returns and correspondence with Tax Office	Retain locally and destroy after 3 years	End of financial year		Financial protocols
Finance <b>FIN</b>	Finance <b>FIN1</b>	Administration and audit <b>FIN11</b>	Correspondence with accountants	Transfer to Records Management for review after 5 years	Review on regular yearly basis		Business activity
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Licensing agreements	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Investment records, including Restricted Funds	Send to Archive for permanent retention	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Signed audited annual accounts and financial statements	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Director's correspondence	Transfer to Records Management for review after 5 years	Review on regular yearly basis		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Final policies and procedures	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Governance <b>FIN12</b>	Meeting papers of RCOG Trading Company	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Pension trust deeds and rules	Send to Archive for permanent retention	Time of update		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Pension Trustees minutes	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Pension actuarial valuation and investment reports	Send to Archive for permanent retention	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Pension Scheme investment policies	Transfer to Records Management for destruction 12 years after final payment under the scheme	At end of active use		
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Deeds of appointment and removal of Trustees	Send to Archive for permanent retention	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Contracting-out certificates and related paperwork	Transfer to Records Management for destruction after 7 years	End of life of scheme		Occupational Pension Schemes (Scheme Administration) Regulations 1996 (SI 1996/1715)
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Pension contribution records, including member benefits schedules and record of employee's contributions	Transfer to Records Management for destruction after 7 years	Final payment under the scheme		For limitation and evidential reasons
Finance <b>FIN</b>	Finance <b>FIN1</b>	Pensions <b>FIN13</b>	Correspondence with Trustees	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	At end of active use		

# RCOG Records Management: Records Classification and Retention Schedule

## Fundraising, Development and Marketing

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Policies and procedures <b>FDM11</b>	Papers and correspondence relating to fundraising initiatives	Send to Archive for permanent retention	Review on regular yearly basis		
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Policies and procedures <b>FDM11</b>	Fundraising publications and printed literature	Remove two years after active use. Retain digital copy.	Time of publication		
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Policies and procedures <b>FDM11</b>	Correspondence with donors and sponsors	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Policies and procedures <b>FDM11</b>	Signed agreements	Intellectual property – permanent retention.  Media release – remove 5 years after active use of media  Contracts – to be stored in Fred's office	At end of active use		
Fundraising, development and marketing	Fundraising <b>FDM1</b>	Policies and procedures <b>FDM11</b>	Media/Photographs of events	Send to Archive for permanent retention	Time of publication		Also store in College MediaLibrary

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
<b>FDM</b>							
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Administration <b>FDM12</b>	Administrative papers and correspondence	Retain locally and destroy	Review on regular yearly basis		
Fundraising, development and marketing <b>FDM</b>	Fundraising <b>FDM1</b>	Administration <b>FDM12</b>	Templates	Retain locally and destroy	At end of active use		
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Evidence of assignment of trade/service marks	Stored with long term contracts	6 years after cessation of registration		
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Certificates of registration of trade/service marks	Retain locally and destroy	6 years after cessation of registration		
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Materials for which copyright protection is claimed	Send to Archive for permanent retention	Time of publication		Retain for minimum of 50 years
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	All contracts	Send to Archive for permanent retention or destroy 10 years after end of contract	At end of active use	See Legal Records and Contracts	Business activity All contracts over £10k held in central database
Fundraising, development and marketing	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Licensing agreements	Send to Archive for permanent retention or destroy 10	At end of active use	See Legal Records and Contracts	Business activity

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
<b>FDM</b>				years after end of contract			
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Correspondence of Director	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Governance <b>FDM21</b>	Artistic works and images	Retain digital copy	Time of creation or acquisition		Business activity May also be held in the College Media Library
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Project papers: meeting notes and final papers	Retain digital copy	At end of active use	Cross-College projects	Business activity
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Project papers: administrative and draft papers	Retain digital copy	Review on regular yearly basis	Cross-College projects	
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Projects: minor contracts and tenders under £10k	Retain digital copy	Review on regular yearly basis		
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Working and development papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Departmental correspondence and papers	Retain locally and destroy	Review on regular yearly basis		
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Market research survey results	Retain digital copy	Time of publication		Business activity
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Corporate promotional material	Retain digital copy	Time of publication		Business activity
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Dotmailer emails	Remove after 2 years	At end of active use		Business activity
Fundraising, development and marketing <b>FDM</b>	Marketing <b>FDM2</b>	Administration <b>FDM22</b>	Social media activity and messages	Retain locally and send a sample to Archive	At end of active use		Business activity

# RCOG Records Management: Records Classification and Retention Schedule

## Global Health

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Papers relating to overseas projects, including meeting papers, reports and correspondence	Send to Archive for permanent retention	Review on regular yearly basis	Cross-College projects	
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Senior Vice President's correspondence with overseas committees etc	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Publications, leaflets, flyers, circulars, and course programmes	Send to Archive for permanent retention	Review on regular yearly basis		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Photographs of international events	Send to Archive for permanent retention	Review on regular yearly basis		May also be added to the College Media Library
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Final reports relating to overseas exams	Send to Archive for permanent retention	Review on regular yearly basis		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Representative Committee minutes	Send to Archive for permanent retention	At end of active use	Committees and groups	
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Signed agreements and memorandum	Send to Archive for permanent retention	At end of active use	Legal records and contracts	
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Governance <b>GLO11</b>	Geographical list of Fellows and Members, and lists of	Send to Archive for permanent retention	At end of active use		



## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
			Representative Council members				
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Correspondence and papers relating to overseas visits by Fellows and Officers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Correspondence and papers relating to sponsorship schemes and medical training initiative	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Representative Committee election papers	Retain locally and destroy	At end of active use		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Templates	Retain locally and destroy	At end of active use		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Administrative papers and correspondence	Retain locally and destroy	At end of active use		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Records of expenses	Retain locally and destroy	At end of active use		
Global Health <b>GLO</b>	Global Health <b>GLO1</b>	Administration <b>GLO12</b>	Budget papers	Retain locally and destroy	At end of active use		

# RCOG Records Management: Records Classification and Retention Schedule

## Governance

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Final copy of all published and unpublished reports and policies	Send to Archive for permanent retention	Time of publication		
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Draft copy of reports and policies	Retain locally and destroy	Time of publication		
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Circulation lists	Retain locally and destroy	Time of update		Data Protection
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Finance and Resource plans	Retain locally and destroy	Time of update		
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Risk assessment	Retain locally and destroy	Time of update		
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Disaster plans	Retain locally and destroy	Time of update		
Governance <b>GOV</b>	Business Priorities <b>GOV1</b>	Policies and procedures <b>GOV11</b>	Performance indicators	Retain locally and destroy	Time of update		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Appointments and honorariums	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Applications and recommendations to Officer posts	Send material of corporate and historical value to Archives;	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
				delete any outdated and unneeded files			
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Officer election papers	Retain locally and destroy	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	President and Officer nomination forms	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	President and Officer copies of committee papers and external publications	Retain locally and destroy	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Routine correspondence	Retain locally and destroy	Review on regular yearly basis		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Expense forms	Retain locally and destroy	On transfer to Finance		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Administration <b>GOV21</b>	Room bookings and meeting administration	Retain locally and destroy	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Correspondence files and papers of President, Officers and CEO	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis and no longer than 5 years from last date on file		Where appropriate, review 1 year after transfer to semi-active storage
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Council: confirmed and signed minutes	Send to Archive for permanent retention	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Council: agenda and circulated papers	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Committee terms of reference	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Final agreements and policies	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Correspondence with solicitors regarding legal advice and administration of services	Transfer to Records Management for review after 6 years	On last claim or resolution of matter		
Governance <b>GOV</b>	Executive <b>GOV2</b>	Governance <b>GOV22</b>	Photographs of Officers and events	Send to Archive for permanent retention	At end of active use		Also be added to the College Media Library
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Contracts <b>GOV31</b>	Signed contracts and agreements	Send to Archive for permanent retention or destroy at end of agreement	At end of active use		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Contracts <b>GOV31</b>	Records of proposals and negotiations	Retain locally and destroy	At end of contract		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Contracts <b>GOV31</b>	Correspondence with solicitors and external organisations	Retain locally and destroy	At end of contract		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Contracts <b>GOV31</b>	Papers relating to the contracts	Transfer to Records Management for review at end of contract	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Insurance <b>GOV32</b>	Employers' liability policies	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Insurance <b>GOV32</b>	Insurance schedules, including group health policies	Transfer to Records Management for destruction after 7 years	At end of life of policy		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Charter administration <b>GOV33</b>	Signed Charter and Articles	Send to Archive for permanent retention	Time of update		Legal requirement
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Charter administration <b>GOV33</b>	Records relating to amendments to Articles and Charter	Transfer to Records Management for review	At end of active use		No records to be destroyed until next update of Articles or Charter
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Assets and investments <b>GOV34</b>	Deeds of Title	Transfer to Records Management for review	Life of the property		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Assets and investments <b>GOV34</b>	Leases	Retain locally and destroy	End of lease		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Assets and investments <b>GOV34</b>	Records relating to legacies and donations	Send to Archive for permanent retention	At end of active use		
Governance <b>GOV</b>	Legal Records and Contracts <b>GOV3</b>	Registers <b>GOV35</b>	Registers of Members and Fellows	Send to Archive for permanent retention	Time of publication		
Governance <b>GOV</b>	Legal Records and Contracts	Registers <b>GOV35</b>	Registers of Trustees and related papers	Send to Archive for permanent retention	Time of publication		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
	<b>GOV3</b>						
Governance <b>GOV</b>	Strategies <b>GOV4</b>	Strategy papers <b>GOV41</b>	Final strategy	Send to Archive for permanent retention	Time of publication		
Governance <b>GOV</b>	Strategies <b>GOV4</b>	Strategy papers <b>GOV41</b>	Correspondence, drafts and supporting papers	Retain locally and destroy	3 months after end of project		
Governance <b>GOV</b>	Strategies <b>GOV4</b>	Strategy papers <b>GOV41</b>	Project administration	Retain locally and destroy	Review on regular yearly basis		

# RCOG Records Management: Records Classification and Retention Schedule

## Human Resources

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Annual Leave spreadsheets and forms	Retain locally and destroy	At end of 2 years		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Staff presentations	Retain locally and destroy	At end of active use		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Human Resources policy records	Send to Archive for permanent retention?	Time of publication	Senior Management Committee papers?	<i>Business activity</i>
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Staff handbooks	Live on the intranet	At end of active use		Business activity
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Employee files, including training, disciplinary and grievance records, absence records, pension information	Transfer to Records Management for review	6 years after employment ceases  Pension information: for the lifetime of the employee or automatically destroy on 100 <sup>th</sup> birthday anniversary	Payroll records	CIPD recommended retention period, based on the time limits for potential UK tribunal or civil claims.
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Disciplinary and grievance records	Transfer to Records Management for review	10 years after employment ceases		Data Protection; FOI
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Training records	Transfer to Records Management for review	10 years after employment ceases		Data Protection

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Personnel files	Transfer to Records Management for review	10 years after employment ceases	Payroll records	Retain pensioners records until 10 years after benefit ceases Additional 4 years retention for non-pension holders at request of Director HR in order to fulfil role giving references
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Staff contact details	Retain locally and destroy	Time of update or 6 years after employment ceases		Data Protection
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Medical and self-certificates	Retain locally and destroy at the end of 4 years	Review on regular yearly basis		Data Protection
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Staff administration <b>HR11</b>	Records relating to injury at work	Transfer to Records Management for review	Life of employee		Legal requirement
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Payroll <b>HR12</b>	Payroll records (including benefits, Income Tax, maternity pay, loans, childcare vouchers)	Transfer to Records Management for review	6 years after employment ceases		Financial regulations
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Payroll <b>HR12</b>	Advances for season tickets, childcare etc	Transfer to Records Management for destruction or destroy locally 6 years after repayment	End of financial year		



## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration <b>HR13</b>	Head of Human Resources' correspondence and papers	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		Business activity
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration <b>HR13</b>	Head of Human Resources' copies of meeting papers	Retain locally and destroy	At end of active use		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration <b>HR13</b>	Team correspondence and papers	Retain locally and destroy	At end of active use		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration	Recruitment information	Retain locally and destroy	6 months after the recruitment process has finished		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration	Redundancy details, calculations of payments, refunds, notification to the Secretary of State	Transfer to Records Management for review	6 years after employment ceases		
Human Resources <b>HR</b>	Human Resources <b>HR1</b>	Administration	Statutory Maternity Pay records: calculations, certificates (Mat B1s) or other medical evidence	Transfer to Records Management for review	6 years after employment ceases		Statutory retention period: 3 years after the end of the tax year in which the maternity period ends. RCOG: 6 years to streamline the admin process

# RCOG Records Management: Records Classification and Retention Schedule

## Information Management

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Multimedia <b>IM11</b>	RCOG images, still and moving	Send to Archive for permanent retention	Time of publication		
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Multimedia <b>IM11</b>	Online lectures (including podcasts and audio recordings)	Send to Archive for permanent retention	Time of publication		
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Multimedia <b>IM11</b>	Recordings of College events	Send to Archive for permanent retention	Time of publication		
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Multimedia <b>IM11</b>	Officer presentation slides	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on regular yearly basis		
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Information Systems <b>IM12</b>	Tenders, contracts and agreements	Retain locally and destroy	At end of contract		
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Information Systems <b>IM12</b>	Policies and procedures	Send material of corporate and historical value to Archives; delete any outdated and unneeded files	Review on a yearly basis		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Information Management <b>IM</b>	Information Technology <b>IM1</b>	Information Systems <b>IM12</b>	Administrative papers	Retain locally and destroy	Review on regular yearly basis		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Policy and procedure <b>IM21</b>	Final policy papers	Send to Archive for permanent retention	Time of publication		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Policy and procedure <b>IM21</b>	Draft policy papers	Retain locally and destroy after 3 months	Time of publication		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Policy and procedure <b>IM21</b>	Project notes and correspondence	Retain locally and destroy after 3 months	At end of project		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Administration <b>IM22</b>	Assessment papers and audit records	Transfer to Records Management for review after 5 years	At end of active use		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Administration <b>IM22</b>	Data Protection/Freedom of Information requests and correspondence	Retain locally and destroy	After 3 year		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Administration <b>IM22</b>	Data Protection/Confidentiality templates for use by RCOG staff	Retain locally and destroy	Time of update		
Information Management <b>IM</b>	Information Governance <b>IM2</b>	Administration <b>IM22</b>	Staff IG training records	Retain locally and destroy	Time of update		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Policy and procedure <b>IM31</b>	See Information Governance - Policy and Procedure				

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Information Management <b>IM</b>	Information Services <b>IM3</b>	Administration <b>IM31</b>	Agenda and Minutes of Meetings	Send to Archive for permanent retention	At end of active use		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Service agreements, licences and contracts	Retain locally and destroy	At end of contract		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Enquiries	Retain locally and destroy after 2 years	End of year	Archive enquiries	
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Clinical queries	Retain locally and destroy	At end of active use		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Literature searches	Retain locally and destroy	At end of active use	NGA	
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Document delivery records	Transfer to Records Management for destruction after 7 years	Review on regular yearly basis		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Document delivery digital copies of articles	Retain locally and destroy	At end of active use		End of active use is when delivery request has been completed
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Invoices and payments	Retain locally and destroy	At end of financial year	Finance	Duplicates sent to Finance Office for retention
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Photocopy request forms and copyright declaration forms	Transfer to Records Management for destruction after 7 years	Review on regular yearly basis		Forms to be kept minimum of 6 years, taken from: <a href="http://www.forumforinterlending.org.uk/wp-content/uploads/2011/05/Emily-Copyright.pdf">http://www.forumforinterlending.org.uk/wp-content/uploads/2011/05/Emily-Copyright.pdf</a>

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Information Management <b>IM</b>	Information Services <b>IM3</b>	Library services <b>IM32</b>	Team administrative correspondence, notes and statistics	Retain locally and destroy	Review on regular yearly basis		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Records of accessions and deposit of gifts/assets	Retain locally	On receipt of asset		To be held as part of catalogue record
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Conservation records	Retain locally	On completion of conservation		To be held as part of catalogue record
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Records of disposal	Retain locally	On disposal		To be held as part of catalogue record
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Promotional material, resource guides and articles	Send to Archive for permanent retention	On publication		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Enquiries	Retain locally and destroy after 2 years	End of year	Library enquiries	
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Successful volunteer placement records	Retain locally and destroy after 3 years	End of placement		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Unsuccessful volunteer placement records	Retain locally and destroy after 1 year	Review on regular yearly basis		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Environmental monitoring records and incident reports	Retain locally and destroy	At end of active use		Destroy if summaries of monitoring statistics made
Information Management <b>IM</b>	Information Services <b>IM3</b>	Heritage services <b>IM33</b>	Collection care and management procedures	Retain locally and destroy	Time of update		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Information Management <b>IM</b>	Information Services <b>IM3</b>	Records management <b>IM34</b>	Records of transfers, reviews and disposals	Retain locally	End of transfer process		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Records management <b>IM34</b>	Retention schedules and classification	Retain locally and destroy	Time of update		
Information Management <b>IM</b>	Information Services <b>IM3</b>	Administration	Copyright and reproduction requests to and on behalf of the RCOG	Destroy after 6 years	Review annually	Journals and Publishing	p.140 copyright for archives and records managers Padfield book

# RCOG Records Management: Records Classification and Retention Schedule

## Journals and ePublishing – Owner: Director, Publishing

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Policy and governance <b>JP11</b>	Contracts and agreements –	see Legal Records – Contracts			
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Policy and governance <b>JP11</b>	Policy and procedures	- see Information Governance - Policy and Procedure			
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Policy and governance <b>JP11</b>	Permissions and author declaration forms	Transfer to Records Management for scheduled destruction after 7 years or regular review	3 years after end of active use (publication)		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Editorial meeting papers	Send to Archive for permanent retention	At end of active use		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Final copy of publications	Send to Archive for permanent retention	Time of publication	Staff publications, membership publications, press releases	
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Sales reports	Retain locally and destroy	At end of active use		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Templates	Retain locally and destroy	Review on regular yearly basis		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Invoices	Retain locally and destroy	Review on regular yearly basis		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Stock lists	Retain locally and destroy	Review on regular yearly basis		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Budget papers	Retain locally and destroy	Review on regular yearly basis		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Proofs of publications	Retain Locally and destroy	At end of active use		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Copyright and reproduction requests to and on behalf of the RCOG	Transfer to Records Management	After 3 years	All requests after 2012 Information Management	p.140 copyright for archives and records managers Padfield book
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Images used in publications	Transfer to Records Management for permanent retention	1 year after end of active life		
Journals and ePublishing <b>JP</b>	Publishing <b>JP1</b>	Administration <b>JP12</b>	Editor's correspondence, papers and files; administrative papers	Transfer to Records Management for review after 5 years	At end of active use		



# RCOG Records Management: Records Classification and Retention Schedule

## Membership

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Fellowship: correspondence, declaration forms, biographical information	Declaration and relevant contact record details should be recorded on Fellow's Integra record (date stamp) and form discarded.  Retain application form and biographical information for 5 yrs locally electronically. All info relating to each applicant to be kept in one folder	Review at end of retention period		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Honorary Fellowships (including Honoris Causa and ad Eundem): correspondence, declaration forms, biographical information	Retain nomination form and supporting information locally electronically for 5yrs.  Declaration should be recorded on Fellow's Integra record (date	Review at end of retention period		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
				stamp) and form discarded  All info relating to each applicant to be kept in one folder			
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Fellowship: lists to Council	Retain locally until Council meeting takes place and then destroy	Review at end of retention period		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Fellowship: correspondence and papers relating to unsuccessful nominations	Retain locally and destroy	Review on regular yearly basis		
Membership <b>ME</b>	Membership <b>ME1</b>	Administration <b>ME11</b>	Fellowship applications	Retain locally and destroy	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Membership: declaration form and registration forms	Retain locally, log relevant information on Integra and then destroy.			
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Membership: Part 2 candidate application files and eligibility forms	Send to Archive for permanent retention	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Membership: correspondence	Retain locally and destroy	Review on regular yearly basis		
Membership <b>ME</b>	Member Services	Administration <b>ME11</b>	Membership without examination:	Transfer to Records	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
	<b>ME1</b>		correspondence and forms	Management for review after 3 years			
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Associate Membership: correspondence and forms	Retain locally, log relevant information on Integra and then destroy.	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Admission ceremonies: correspondence and administrative paperwork	Retain correspondence and paperwork locally and destroy  Send one hard copy of each admission ceremony programme to Archives for permanent retention	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Artistic works, including recording, films, photographs, programmes and broadcasting	Send to Archive for permanent retention noting copyright owner	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Images	Send to Archive for permanent retention noting copyright owner	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Membership: notification of death	Retain locally until logged on Integra and then destroy	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Membership: obituaries and memorial records	Retain locally electronically for 2yrs and then review	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Departmental correspondence/emails	Retain locally and destroy	Review every 6 months		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Advisory Appointment Committee papers	See Committees and groups			
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Papers relating to successful award winners/lectureships	Retain applications locally electronically for 3yrs and then review	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Papers relating to unsuccessful award winners/lectureships	Retain applications locally electronically for 3yrs and then review	At end of active use		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Papers and correspondence relating to careers	Send a copy of hard copy careers brochures and other promotional printed material to archives.			

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
				Retain all other promotional material locally electronically and review after 5yrs			
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Templates for membership correspondence	Retain locally electronically, review annually	Review annually		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Lists of representatives on outside bodies	Retain locally electronically, review annually	Time of update		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Administrative correspondence	Retain locally and destroy	Review on regular yearly basis		
Membership <b>ME</b>	Member Services <b>ME1</b>	Administration <b>ME11</b>	Fellows and Members contact details	Retain locally on Integra, review inactive records every 5yrs, destroy if no activity in last 5yrs	When amendments are requested by the contact and at point of review		
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	Membership Surveys and Reports	Replace identifiable details with a unique reference. Survey responses to be retained securely locally for analysis and reviewed every 5yrs.	At time of report publication		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
				Retain survey reports in electronic archive permanently.  Destroy data after active use			
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	RCOG Census report and returns	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	At end of active use	Manpower surveys Staffing census	All legacy data returns to be destroyed within 5 years
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	Final strategy papers	Retain in electronic archive permanently	Time of publication		
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	Retired Fellows and Members Society – meeting papers	See Committees and groups			
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	Working Group and Committee papers	See Committees and groups			
Membership <b>ME</b>	Member Services <b>ME1</b>	Policy and strategy <b>ME12</b>	Register of Fellows and Members	Review annually for accuracy.  Retain in electronic archive centrally	At end of active use		

## RCOG Records Management: Records Classification and Retention Schedule

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
Membership <b>ME</b>	Member Services <b>ME1</b>	Removals and reinstatements <b>ME13</b>	Correspondence	Retain locally and destroy	Review on regular yearly basis		

### Operations

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
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## RCOG Records Management: Records Classification and Retention Schedule

Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Records of major projects	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	At end of active use		Statutory requirement  College policy
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Records of minor projects	Retain locally and destroy after 3 months	At end of active use		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Records of property development	Transfer to Records Management for destruction on disposal of property or retain locally and destroy	Review on regular yearly basis		Internal Assessment
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Routine inspection records	Transfer to Records Management for destruction 5 years after inspection or retain locally and destroy	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Major maintenance works	Transfer to Records Management for destruction on disposal of property or retain locally and destroy	At end of active use		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Minor maintenance works	Transfer to Records Management for destruction after	At end of active use		The National Archives



## RCOG Records Management: Records Classification and Retention Schedule

				15 years or retain locally and destroy			
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Records of procedure relating to management of property	Retain locally and destroy	Time of update		The National Archives Internal Assessment
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Plans	Send to Archive for permanent retention	At end of active use		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Project and works specifications	Retain locally and destroy	At end of active use		The National Archive
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Tenders and records for unsuccessful contracts	Retain locally and destroy after 2 years	At end of active use		The National Archive
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Tenders and records for successful contracts, including specifications, job sheets and records of goods	Retain locally and destroy after 6 years	End of contract		The National Archive
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Property security management including inspection records, security breaches and procedure records.	Retain locally and destroy after 2 years	Time of update		Internal Assessment The National Archive
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Records of space management audits	Retain locally and destroy after 5 years	Time of update		The National Archive
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Master copies of instructions or	Retain locally and destroy on	Review on regular yearly basis		The National Archive

## RCOG Records Management: Records Classification and Retention Schedule

			procedures for equipment	disposal of equipment			
Operations <b>OP</b>	Buildings <b>OP1</b>	Property services and management <b>OP11</b>	Invoices and budgets - see Finance - administration and audit	Retain in BRC for seven years		Finance Dept	Internal Assessment The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Risk assessment papers	Retain locally and destroy after 3 years	Time of update		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Equipment assessment records, including inspection and testing	Retain locally and destroy 6 years after disposal of equipment	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Premises assessment papers, including inspection, monitoring and maintenance records	Retain locally and destroy after 5 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Asbestos testing and monitoring	Retain locally and destroy after 40 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Accident/Incident report forms	Retain locally and destroy after 40 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Control of Substances Hazardous to Health records	Retain locally and destroy after 40 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Fire safety training certificates	Retain locally and destroy	End of appointment		The National Archives

## RCOG Records Management: Records Classification and Retention Schedule

Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	First Aid training records	Retain locally and destroy 5 years after issue	End of appointment		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Health and Safety training records	Retain locally and destroy 5 years after issue	End of appointment		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Workstation assessment forms	Retain locally and destroy after 40 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Fire Certificates	Retain in BRC until expiry or superseded Destroy 12 years after expiry or superseded	At end of active use		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Emergency planning records, including emergency plan and records of major local incidents	Retain in BRC until 40 years after date of event Review 30 years after date of even	At end of active use		The National Archives
Operations <b>OP</b>	Buildings <b>OP1</b>	Health and safety <b>OP12</b>	Emergency planning tests and records of minor local incidents	Retain locally and destroy after 10 years	Review on regular yearly basis		The National Archives
Operations <b>OP</b>	Catering <b>OP2</b>	See Events and conferencing - College social events and outside bookings					
Operations <b>OP</b>	Accommodation <b>OP3</b>	Administration <b>OP31</b>	Hotel bookings correspondence and forms	Retain locally and destroy	Review on regular yearly basis		
Operations <b>OP</b>	Accommodation <b>OP3</b>	Administration <b>OP31</b>	Hotel invoices	Transfer to Records Management for	Review on regular yearly basis		

## RCOG Records Management: Records Classification and Retention Schedule

				destruction or destroy locally at end of financial year plus 6 years			
Operations <b>OP</b>	Accommodation <b>OP3</b>	Administration <b>OP31</b>	Hotel night audit reports	Retain locally and destroy after 2 years	Review on regular yearly basis		
Operations <b>OP</b>	Accommodation <b>OP3</b>	Administration <b>OP31</b>	Promotional material	Send to Archive for permanent retention	At end of active use		
Operations <b>OP</b>	Operations <b>OP4</b>	Asset management <b>OP41</b>	Gifts and asset register	Retain locally	Time of update		
Operations <b>OP</b>	Operations <b>OP4</b>	Asset management <b>OP41</b>	Wine stock lists	Send to Archive for permanent retention	At end of active use		
Operations <b>OP</b>	Operations <b>OP4</b>	Asset management <b>OP41</b>	Wine requisition sheets	Retain locally and destroy after 2 years	Review on regular yearly basis		
Operations <b>OP</b>	Operations <b>OP4</b>	Asset management <b>OP41</b>	Photographs of the College building	Send to Archive for permanent retention	At end of active use		

# RCOG Records Management: Records Classification and Retention Schedule

## PR & External Communications

<i>Business activity</i>	<i>Function</i>	<i>Narrower function</i>	<i>Record series</i>	<i>Retention status</i>	<i>Trigger</i>	<i>Related series</i>	<i>Other information/authority</i>
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Central Policy Unit <b>PR11</b>	Responses to external consultations	Send to Archive for permanent retention	Review on regular yearly basis	President/Officer papers	Business activity
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Central Policy Unit <b>PR11</b>	Public affairs briefings to members	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Central Policy Unit <b>PR11</b>	Press digests/releases	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Policy and procedure <b>PR11</b>	Press statements	Send to Archive for permanent retention	Review on regular yearly basis		Business activity
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Policy and procedure <b>PR11</b>	Media guidelines and procedures	Send to Archive for permanent retention	At end of active use		Business activity
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Administration <b>PR12</b>	Working files and schedules	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	Review on regular yearly basis		Business activity

## RCOG Records Management: Records Classification and Retention Schedule

PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Administration <b>PR12</b>	Templates, contact lists and draft reports	Retain locally and destroy	At end of active use		
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Administration <b>PR12</b>	Copies of guidelines and publications	Retain locally and destroy	Review on regular yearly basis		
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Administration <b>PR12</b>	Images and presentations	Send to Archive for permanent retention	At end of active use		
PR & External Communications <b>PR</b>	External Communications <b>PR1</b>	Administration <b>PR12</b>	Correspondence with public relating to PR issues	Retain locally and destroy	Review on regular yearly basis		
PR & External Communications <b>PR</b>	Internal Communications <b>PR2</b>	Administration <b>PR21</b>	Submissions to staff circular	Retain locally and destroy	At end of active use		
PR & External Communications <b>PR</b>	Internal Communications <b>PR2</b>	Administration <b>PR21</b>	Final copy of staff circular	Send to Archive for permanent retention	Time of publication		
PR & External Communications <b>PR</b>	National Health Policy <b>PR3</b>	External groups - clinical quality and education health <b>PR31</b>	Correspondence and reports of meetings	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	Review on regular yearly basis		
PR & External Communications <b>PR</b>	National Health Policy <b>PR3</b>	All external groups <b>PR32</b>	Responses to consultations	Send to Archive for	Review on regular		

## RCOG Records Management: Records Classification and Retention Schedule

				permanent retention	yearly basis		
PR & External Communications <b>PR</b>	National Health Policy <b>PR3</b>	Policy <b>PR33</b>	Correspondence and reports	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	Review on regular yearly basis		
PR & External Communications	National Health Policy	Administration	Working files and schedules	Send material of corporate and historical value to Archives; delete any outdated and unneeded files and personal data	Review on regular yearly basis		
Associated Societies	See guidance above for functional series of records						