

Retention Schedule - General - All Services Contracts

Note: This Retention Schedule applies to all data held in any format (i.e. paper, electronic, microfiche etc)

Service	Function	Document Description	Retention Period
General - all services	Contracts	Interview Panel - Report and Notes	1 Year from end of Contract
General - all services	Contracts	Draft Specification	Destroy when specification has been agreed.
General - all services	Contracts	O&M Manual	Indefinite - Continuously updated.
General - all services	Contracts	Successful tender document	Retain for length of the limitation period plus 2 years
General - all services	Contracts	Unsuccessful Tender Documents	1 Year After Start of contract.
General - all services	Contracts	Paper Job Tickets (Held Electronically but missing breakdown of ticket value)	Can be disposed of after 6 Years (In 6 years this item will be redundant.)
General - all services	Contracts	Agreed Specifications, Letter of acceptance, Dispute over payment, Evaluation Criteria (Incl finance and health & safety checks, extensions to contract, Final Accounts, Forms of Variations, Invitation to Tender, Reports from Contractors, Schedule of Works, Signed Contract, Successful Tender Document, Maintenance Programmes/ Schedules, Bills of Quantity, Minutes and papers of contractual meetings.	6 Years from end of contract unless under seal then 12 Years.
General - all services	Contracts	Changes to requirements	6 years from end of contract unless under seal then 12 years
General - all services	Contracts	Commissioning letter	1 year from end of contract
General - all services	Contracts	Disputes over payment	6 years from end of contract
General - all services	Contracts	End user requirement	6 years from end of contract unless under seal then 12 years
General - all services	Contracts	Evaluation criteria (incl finance and health & safety checks)	6 years from end of contract
General - all services	Contracts	Extensions to contract	6 years from end of contract unless under seal then 12 years
General - all services	Contracts	Final accounts	6 years from end of contract unless under seal then 12 years
General - all services	Contracts	Forms of variation	6 years from end of contract
General - all services	Contracts	Interview panel - report and notes of proceedings	1 year from end of contract
General - all services	Contracts	Invitation to tender	6 years from end of contract
General - all services	Contracts	List of approved suppliers	An active document - updated regularly
General - all services	Contracts	Minutes and papers of meetings	Retain for length of the limitation period plus 2 years
General - all services	Contracts	Policy on contracts, normally contained in a separate registered file series	2 years
General - all services	Contracts	Reports from contractors	Retain for length of the limitation period plus 2 years

General - all services	Contracts	Schedules of works	Retain for length of the limitation period plus 2 years
General - all services	Contracts	Signed contract	6 years from end of contract unless under seal then 12 years
General - all services	Contracts	Statements of interest	1 year from start of contract
General - all services	Contracts	Surveys and inspections - buildings	Second review
General - all services	Contracts	Surveys and inspections - equipment and supplies	2 years from start of contract
General - all services	Contracts	Individual reports drawn up under regulation 84	For at least 3 years from the date of the award of the contract.
General - all services	Contracts	Drawings	Indefinite unless asset is sold or building is demolished.
General - all services	Contracts	Asbestos Register	Indefinite unless asset undergoes further alterations/ asbestos removal