

Function – Estates (v2 – August 2021)

Responsible Person – Director of Estates

Type of Records	Retention Period	Disposal Action	Notes (for example statutory reason for specified retention period)
Estates Strategy			
Documents relating to the development of the Estates strategy	Strategy is superseded + 10 years	Destroy	
Documents relating to the development of Estates management policies and procedures (including working papers)	Policy or procedure is published + 1 year	Destroy	
Master copies of Estates management policies and procedures	Policy or procedure is superseded + 10 years	Destroy	
Facilities Strategy			
Documents relating to the development of the Facilities strategy	Strategy is superseded + 10 years	Destroy	
Documents relating to the development of Facilities management policies and procedures (including working papers)	Policy or procedure is published + 1 year	Destroy	

Master copies of Facilities management policies and procedures	Policy or procedure is superseded + 10 years	Destroy	
Property			
Records relating to the acquisition or use of property through purchase, transfer, donation, lease or rental	Disposal of property + 12 years	Destroy	The 1973 Act
Records relating to the disposal of property	Disposal of property + 12 years	Destroy	The 1973 Act Some of these records may be transferred to the new owner when property is sold.
Records relating to property acquisition negotiations	Closure of negotiations + 6 years	Destroy	The 1973 Act
Records relating to the development of property or land	Disposal of property or expiry of consent	Destroy	Planning consents which are valid when a property is sold are transferred to the new owner. SI 2007/320 reg 17(4)
Records documenting leasing out arrangements for properties	Expiry of lease + 12 years	Destroy	The 1973 Act

Property Maintenance			
Records relating to the maintenance of land and buildings	Investigation reports – 5 years Minor works – Completion of works + 15 years Major works – Disposal of property	Destroy	The 1973 Act
Records relating to the condition, removal or maintenance of asbestos	Removal of asbestos + 80 years Or Inspection of asbestos + 80 years	Destroy	Retaining these records provides evidence of compliance with SI 2006/2739.
Security			
Records documenting outcome of security inspection	Until next inspection completed	Destroy	
Records of security passes issued	Issue of security pass + 1 year	Destroy	
Records documenting property access controls to secure areas (e.g. access registers, key registers, security data logs)	Creation + 2 years	Destroy	

Records documenting the conduct of routine security surveillance of properties (e.g. CCTV surveillance, guarding, patrolling)	Creation + 1 month	Destroy	
Records documenting security breaches or incidents, and action taken	Last action on incident + 1 year	Destroy	
Records documenting the conduct and outcomes of space audits	Completion of subsequent audit + 5 years	Destroy	
Facilities			
Records relating to facilities inspections	Until 2 subsequent inspections have been completed	Destroy	
Records relating to facilities development (including interior design and fit-out schemes)	Completion of development + 15 years	Destroy	The 1973 Act
Records relating to the specification of requirements for facilities	Completion of works + 15 years	Destroy	The 1973 Act
Records documenting facilities maintenance works	Major works - until renewal or disposal + 15 years	Destroy	The 1973 Act

	Minor works – 5 years after works carried out		
Facilities compliance management original licences and certificates	Until superseded	Destroy	