Consultants

Retention Policy

Approved by:Alistair McDermott, CEOOriginator:Karen Johnson, Director of Business Delivery

Purpose and Context

This Policy covers all records, regardless of physical form, which are created, received and/ or maintained by ICON and its staff in the course of ICON business. All such records are ICON records and remain its property. This records are subject to this Retention Policy.

Definitions

Records: are all formats of information including documents, email, memoranda, minutes, audiovisual materials and business system data.

Policy Statement

ICON must retain certain records for operational purposes, and to demonstrate compliance with statutory or regulatory requirements. The Archives and Corporate Records Unit (ACRU) will provide advice on all aspects of record management to enable ICON to fulfil these requirements, and will identify best practice as a contribution towards general excellence in information management.

Related policies/procedures

• Policy and Procedure for Records; creation, management, storage and destruction

Procedure

1. Aim and Scope of Procedure

To set out the requirements for the management, handling, storage and destruction of Records (including opportunity and project records).

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2. Procedure

ICON will maintain a schedule for each section listing the periods for which each type of record must be retained. These schedules are drawn up in consultation with the section taking into account any relevant compliance and operational requirements. The entire schedule is subject to the approval of the ICON's Management Board.

Where records are identified as having a permanent historical value, they will be transferred to the Archives and Corporate Unit. The transfer of records to the ACRU must be agreed by the College Archive and Corporate Records Manger and the depositor and it must have been established prior to transfer that there is adequate storage space available. Permanent historical value if records is determined by a consideration of various factors such as their uniqueness, reliability, time span, accessibility (as regards interpretation of the records), and frequency of use (including both current and predicted research need). The records thus selected should adequately document the history and development of ICON and its various functions.

After records have been retained for the stated period, except where otherwise indicated, they should be destroyed.

Using the retention schedule:

Column (a) lists the different record types under separate headings. Sometimes you will need to refer to a different section to find the retention period for the type of record (e.g. all business units create finance records).

Colum (b) states the section primarily responsible for the type of record. Where appropriate, more than one team is listed.

Column (c) indicates when a copy of the record (or on occasion the original) should be sent to the Archives and College Record Unit for permanent retention as an archive.

Column (d) states the recommended retention period for the record type. When the schedule refers to a starting point + number (e.g. current year + 7), the number refers to the number of years for which the record should be further retained.

Column (e) outlines any statutory, legal or other guidance that determines the retention period stated in column (d)

Column (f) contains additional relevant notes.

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Staff Responsibilities

Dr Alistair McDermott, Chief Executive Officer (CEO)	Ultimate responsibility for ensuring that Records are maintained for all Consultants, Clients and Staff by the policy and procedure being in place, and adhered to, and is used appropriately, with respect for confidentiality and privacy of individuals and in line with the requirements of in accordance with the applicable data protection legislation (the Data Protection Act 1998 (and any replacement laws) and, from 25 May 2018, the General Data Protection Regulations (the "GDPR") and ICON's Data Protection Policy, which follows College's.
Dr Karen Johnson, Director of Business delivery	Responsible for ensuring that the content of the policy and procedure is in line with statutory requirements and professional guidance. Ensures that staff, as appropriate, are aware of the policy and procedure and how to apply it.
Staff	Responsible for compliance with the policy and procedure.

Policy Monitoring and Review

The policy will be reviewed, as a minimum every three years.

Staff training requirements

All staff to be aware of the policy and procedure and be aware of professional guidance on record keeping for staff.

Audit plan

Adherence to the stated policy will be audited through regular and on-going audit of records being handled in accordance to the retention schedule.

References

The Data Protection Act 1998 (and any replacement laws) and, from 25 May 2018, the General Data Protection Regulations (the "GDPR") and ICON's Data Protection Policy, which follows College'

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CON RETENTION SCHEDULE				
	creation for permanent retention?	Retention period	Statutory / legal compliance requirements / other guidance	
(b)	(c)	(d)	(e)	(f)
Company Secretary	Ү- сору	Permanent		Available on the Company's SharePoint
Company Secretary	Ү- сору	Permanent		Available on the Management's SharePoint
0		Permanent		Available on the Company's SharePoint
Varketing & Communication Manager		Permanent		Available on the Company's SharePoint
Office Manager	Ү-сору	Termination date + 12		
CEO		Permanent		Available on Company website
Finance		Permanent		Available on the Company's SharePoint
Director of Business Delivery		Permanent	ICON risk register sent to Director of Risk every February	Available on College's Risk Management web pages
Office Manager	Y-if original exists	Termination date + 6		Available on Company Deltek Vision
Office Manager	Y-if original exists	Termination date + 6		Available on Company Deltek Vision
Office Manager	Y-if original exists	Termination date + 6		Available on Company Deltek Vision
Office Manager	Y-if original exists	Termination date + 6		Available on Company Deltek Vision
inance		Permanent		
HR/ Pensions		Permanent		
Payroll	Current tax year + 6		Tax legislation	
Payroll	Current tax year + 6		Tax legislation	
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-			-	retained electrically
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	Current tax year + 6		Tax legislation	
	Current tax year + 6			
			Tay legislation	
	Retain until policy terminated + 6		Limitation Act	
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Audit Reports					
Audit Reports	Internal Audit / KPMG	Ү- сору	Completion of audit + 5	JISC recommendation	
Property Management					
Leases	CEO		Permanent - transferred to		
			ACRU once no longer required by		
			ICON		
Facilities Management					
Courier logs	Office Manager		Current + 1		
Postage logs	Office Manager		Current + 1		
Key issue/ return logs	Office Manager		Current + 1	GDPR	
Health and Safety					
Risk Assessments	Office Manager		Superseded + 3: safety permanent		
Reporting and investigations of accidents	Office Manager		Closure of investigation + 40	Limitation Act 1980 + case law	
and dangerous occurrences					
				H&S at Work Act 1974	
				Reporting of Injuries, Diseases and	
Accident book/ records/ reports	Office Manager		Retain from date of last entry + 3	Dangerous Occurrences regulations 1995	Details put inputted onto Safety database
Health and Safety agenda, minutes and papers	Office Manager / Company Secretary		Permanent		
Human Resources					
HR Regulations, Policies and Codes of Practices	HR		Retain while current, then destroy		Available on Company SharePoint
			Retain while current, then transfer		Available on Company SharePoint
			to		
Restructuring Documents	HR		ACRU when no longer required		
			Transfer to HR to be	GDPR; Equality Act 2010; Equal pay Act 1984	
Appraisal forms (PRDP)	All Teams		incorporated into HR staff file	Equal Pay Act 1984	
			HR: Closure of case + 7	Limitation Act 1980	
Staff disciplinary / grievance case files	HR		(incorporated into the staff HR file)	GDPR	
Job evaluation criteria and grading schemes	HR		Permanent - added to staff file		
Job descriptions	HR		Permanent		
	HR		HR: Permanent - transfer to ARCU	Limitation Act 1980	
			storage on termination of	GDPR	
			employment/ retirement (leavers		
Individual staff files			file)		
Building society / mortgage references	HR		Incorporate into HR staff file		
Recruitment documentation			EEA nationals: current + 1 year		
including authorisation to recruit, adverts, short listing			Non EEA retain for duration of		
notes etc.	HR		employment		

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Backup schedules ICT Retain while current + 1 Instance Backup schedules Deltek Vision Retain while current Instance Archiving Schedules ICT Permanent Instance Design, development and Business Delivery Retain while current Instance	Records of testing and operation of	СТ	Permanent			
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Archiving Schedules ICT Permanent International Permanent Design, development and Business Delivery Retain while current International Internating International International	Backup schedules	ICT	Retain while current + 1			
Design, development and Business Delivery Retain while current	Backup schedules	Deltek Vision	Retain while current			
	Archiving Schedules	ICT	Permanent			
mplementation of IT systems	Design, development and	Business Delivery	Retain while current			
	implementation of IT systems					

Retention Policy		
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