

Organisation: Liverpool Hope University - Estates Office Data Retention Schedule

	Document Description	Retention Period	Start of Retention	Relevant Legal Provision
	Legal Files/ Contracts & Agreements			
	Intellectual property records	No minimum, documents should be retained for the life of the intellectual property right + 6 years there after	The date of registration	Section 5 Limitation Act 1980
	Contracts, agreements and other arrangements	Length of contract/agreement + 6 years there after.	Date of execution of service agreement	Section 5 Limitation Act 1980
	Legal files concerning provision of services (lawyers; architects and other professional services)	No minimum, documents should be retained for the life of the intellectual property right + 6 years there after	Date of execution of service agreement	Section 5 Limitation Act 1980
	Property Management			
	Records documenting acquisition of ownership of properties	Closure of negotiations + 6 years		1980 c. 58 s 2
	Records documenting the negotiation of leases and original lease agreements	End of lease + 15 years	The date that documents are created	
	Residential Tenancy Agreements	End of tenancy + 6 years	The date that documents are created	Code of practice for Residential Lettings 1.h
	Accommodation Services			
	Booking Forms	6 years after booking	The date that documents are created	
	Accommodation Lists	Destroy when superseded		
	Tenancy agreement	End of tenancy + 6 years	The date that documents are created	
	Accommodation Fee Register	6 years after booking	The date that documents are created	
	Waste Disposal Certs + Statistics	End of year + 3 years		
	Building Maintenance			
	Building condition surveys	Date of survey + 10 years		
	Records documenting minor maintenance works on property	Completion of works + 5 years		1980 c. 58 s 14B

	Asbestos assessments as required by Regulation 4(3) of Control of Asbestos Regulation 2006	Review of Assessment + 10 years		
	Records documenting the monitoring of the condition of asbestos, maintaining and removal	Permanent retention		SI 2006/2739
	Records documenting interior refurb and fit out works	Completion of works + 5 years		1980 c. 58 s 14
	Records documenting major maintenance works within facilities	Completion of works + 12 years		
	Drainage survey reports	Permanent retention		
	Roof Inspection Reports including fall arrest	Date of Report + 5 years		
	Records documenting Planned Preventative Maintenance work	Current year + 5 years		
	Maintenance Contracts	Cessation of Contracts + 5 years		
	CAD Drawings + O&M Manuals	Permanent retention		
	Equipment (Plant/ Lifts/ Fire Systems)			
	Records documenting installation of safety critical equipment	Decommissioning/ removal + 6 years		
	Reports of pre-commissioning examinations of lift equipment	Decommissioning/ removal of plant		SI 1998.2307
	Inspection, testing and maintenance of equipment	Disposal of item + 1 year		SI 1998/2307 Regulation 11(2)(a)(ii)
	Maintenance logs for equipment	Decommissioning/ removal + 6 years		SI 1994/30140
	Records documenting inspection, testing and maintenance of safety critical equipment	Completion of subsequent inspection		SI 1998/2306 Regulation 5(2) 16980 c. 58 s 5
	Energy Management			
	Records documenting formal reviews of energy use and action taken to address concerns	Review every 2 years		
	Monitoring use and consumption of energy	Review every 2 years		
	Energy Certificates for all buildings	Permanent retention		
	Meter Readings	Review every 2 years		
	Annual Utilities Reports	Review every 2 years		