

Property and Land Management

Ref. No.	Function Description	Retention Action	Examples of Records	Notes
	Property and Land Management			
8.1	Reports to management on overall property of the local authority	Permanent. Offer to Archivist. Transfer to place of deposit after administrative use is concluded	<ul style="list-style-type: none"> • Consolidated property & buildings annual reports • Summary of leased property • Summary of local authority's owned property • Site register • Register of leases 	Common practice
	Property Acquisition and Disposal			
8.2	[see also Conveyance] Management of the acquisition (by financial lease or purchase) process for real property (see also 21.1.0)	Retain for life of property or building plus 12 years. Offer material re major/significant properties to Archivist for review	<ul style="list-style-type: none"> • Plans 	Common practice

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8.3	Management of the disposal (by sale or write off) process for real property	Destroy 15 years after all obligations/entitlements are concluded. Offer material re major/significant properties to Archivist for review	<ul style="list-style-type: none"> • Legal documents relating to the sale • Particulars of sale documents • Board of Survey • Tender documents • Conditions of contracts 	Common practice
	Property Development and Renovation			
8.4	The process of managing and undertaking renovations and development of property			
8.5	Management <ul style="list-style-type: none"> • buildings and estates of “special interest” 	Permanent. Offer to Archivist. Transfer to place of deposit after administrative use is concluded	<ul style="list-style-type: none"> • Project specifications • Plans • Installation manuals • Certificates of approval 	Common practice
8.6	Management <ul style="list-style-type: none"> • all other buildings and estates 	Retain for life of property or building	<ul style="list-style-type: none"> • Project specifications • Plans • Installation manuals • Certificates of approval 	Common practice For asbestos see health and safety under General Public Services

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8.7	The action process involved in the development and renovation of property	Destroy 7 years after the conclusion of the transaction that the record supports	<ul style="list-style-type: none"> • Work orders • Tender documents • Conditions of contracts 	Common practice
Leasing And Occupancy				
8.8	The process of managing leased property	Destroy 15 years after the expiry of the lease	<ul style="list-style-type: none"> • Lease agreements • Rental expenditure authorities • Valuation queries • Applications for leases, licences & rental revision 	Common practice
8.9	The process of managing the occupancy of property	Destroy 7 years after the conclusion of the transaction that the record supports	<ul style="list-style-type: none"> • Requests for works, cleaning, etc. 	Common practice
Housing Provision				
8.10	The process of managing local authority welfare housing estates	Destroy 4 years after last action	<ul style="list-style-type: none"> • Stock monitoring records 	Common practice

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Systems Management				
8.11	The internal process to develop or extend the capabilities of a system used to support the activities of the local authority	Retain for life of system then destroy		
8.12	The process to implement a system used to support the activities of the local authority	Destroy 7 years after last action	<ul style="list-style-type: none">• Implementation plan	
8.13	The process to support and administer a system used to support the activities of the local authority	Destroy 5 years after last action		
Transport Management				
8.14	The process of acquisition and disposal of vehicles through lease or purchase	Destroy 7 years after the disposal of the vehicle	<ul style="list-style-type: none">• Leases• Contracts• Quotes• Approvals• Fleet authorisation numbers	

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8.15	The process of managing allocation & maintenance of vehicles	Destroy 7 years after the sale or disposal of the vehicle	<ul style="list-style-type: none"> • Approvals as drivers • Allocations & authorisations for vehicles • Maintenance 	
8.16	The process of recording vehicle usage	Destroy 3 years after the sale or disposal of the vehicle	<ul style="list-style-type: none"> • Vehicle usage reports 	
8.17	The process of recording drivers usage	Destroy 7 years after closure	<ul style="list-style-type: none"> • Vehicle log book 	
Insurance				
Policy Management				
8.18	The summary management of insurance arrangements	Permanent. Offer to Archivist. Transfer to place of deposit after administrative use is concluded.	<ul style="list-style-type: none"> • Insurance register 	
8.19	The process of insuring local authority officers, property, vehicles and equipment against negligence, loss or damage	Destroy 7 years after the terms of the policy have expired	<ul style="list-style-type: none"> • Insurance policies • Correspondence 	

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8.20	The process of renewing insurance policies	Destroy 5 years after the insurance policy has been renewed	<ul style="list-style-type: none">• Insurance policy• Renewal records• Correspondence	
	Claims Management			
8.21	The process that records insurance claims against the local authority or local authority officers	Destroy 7 years after all obligations/entitlements are concluded (allowing for the claimant to reach 25 years of age)	<ul style="list-style-type: none">• Claims records• Correspondence	