



## Colchester Operatic Society's Retention schedule

(Also found in Section 2 of our Privacy policy)

This table sets out what data and information we hold as an organisation, why we hold it, who is responsible for it, where it is held and for how long:

Data and/or Information held	Why we hold it?	Who is responsible for it?	Where is it held?	How long is it held for?
<b>Members names &amp; contact details</b>	To contact members with information about the Society and its productions and events	<b>Membership Secretary processes and stores this information &amp; details are shared with the Secretary, Chair, Marketing Lead and Webmaster</b> (webmaster shares responsibility for maintaining the website database, Marketing lead maintains our mailchimp database and Chair supports both webmaster and marketing lead)	Membership forms completed by members are stored by the Membership Secretary, Database stored on Membership Secretary's personal computer, The Society's Website database, The Society's Email accounts address books, Mailchimp Members database	<b>For as long as they are a member-</b> they become past members when they stop renewing membership (see below)
<b>Past members names &amp; contact details</b>	To contact past members with information about the Society and its productions and events	<b>Membership Secretary processes and stores this information</b> (Webmaster shares responsibility for maintaining the website database Marketing lead maintains our mailchimp database and Chair supports both webmaster and marketing lead)	Membership forms completed by members are stored by Membership Secretary, Database on Membership Secretary's computer, The Society's Website database, The Society's Email accounts address books, Mailchimp Members database	<b>No more than 20 years</b> (unless the member requests it to be deleted or details become invalid/out of date)

<b>Committee names and contact details</b>	To contact committee members with information about the Society, its productions, events and committee meetings	<b>Secretary</b> creates a contact list which <b>all committee members have access to</b> (unless requested otherwise)	Committee members Email accounts address books, Secretary holds database/contact sheets for committees which are shared digitally and in paper form with other committee members	<b>For as long as a member remains on a committee</b>
<b>Names and Email addresses (marketing list)</b>	To contact interested parties about our productions and events	The <b>Marketing &amp; Events Committee</b> manage our <b>Mailchimp</b> account. Interested parties sign up to receive emails themselves via our website/facebook page. Our Chair and membership Secretary have access to the account also.	Mailchimp database (password protected)	<b>As long as the interested party agrees to receive emails</b> (each email gives them the option to unsubscribe) or until the email address is no longer valid/in use.
<b>Medical details &amp; emergency contacts for cast members and volunteers of a production</b>	To ensure cast members health, safety & well-being at all times	<b>Membership Secretary processes and stores this information.</b> It is passed to <b>production director or appointed personnel attending rehearsal in place of membership secretary</b> , as necessary, for emergencies & to safeguard members wellbeing.	Paper copies are stored by the Membership secretary and taken in a folder, with restricted access, to rehearsals and performances. Lists of contacts or allergies/conditions of cast may be created and stored by the Membership secretary for quick reference if deemed necessary and/or appropriate. If the membership secretary is not attending rehearsals they will pass the information to a trusted/appointed person (possibly Production Director or Exec Committee member).	From the time the form is completed, for the duration of the production and <b>up to 6 months after a production finishes.</b> The information is then destroyed.

<p><b>Consent and policy agreement forms</b></p>	<p><b>Show specific-</b> To ensure we have informed consent to take photos and videos of cast members during rehearsals &amp; productions for publicity, programmes and choreography learning purposes, <b>Ongoing membership-</b> To ensure we have informed consent for holding contact information, To ensure all members agree to our rules, policies &amp; procedures &amp; codes of conduct <b>Ongoing Volunteers and chaperones-</b> to ensure all volunteers and chaperones agree to adhere to all relevant rules, policies &amp; procedures &amp; codes of conduct</p>	<p><b>Membership Secretary processes and stores this information.</b> This task may be delegated to the production director or another appointed committee member in place of the membership secretary if appropriate (individuals will be informed who holds/processes this information in this instance).</p>	<p>Paper copies are stored by the Membership secretary, lists of consent received may be created and stored by the Membership secretary for quick reference as necessary/appropriate. This task may be delegated to the production director or another appointed committee member in place of the membership secretary if appropriate (individuals will be informed who holds/processes this information in this instance).</p>	<p><b>For production specific consent and agreement forms-</b>From the time the form is completed, for the duration of the production and <b>up to 6 months after a production finishes.</b> The information is then destroyed. <b>For ongoing membership consent and agreement forms—</b>for as long as they are members and up to 20 years after they stop renewing membership (as deemed appropriate/necessary) <b>For ongoing Volunteer &amp; chaperone consent and agreement forms—</b>for as long as they are volunteering and up to 20 years after they stop (as deemed appropriate/necessary)</p>
<p><b>Committee meeting Minutes</b></p>	<p>As a record of discussion and decisions in Committee minutes which relate to the organisation and management of the Society</p>	<p><b>Secretary/Assistant Secretary processes and stores this information.</b></p>	<p>Paper copies and/or digital copies are held by the <b>Secretary</b>, Digital copies are emailed to all relevant committee members who may then keep their own records</p>	<p><b>7 years</b></p>

<b>Contracts</b>	As a record of all terms & agreements signed on behalf of the Society for financial & legal purposes	<b>Business Manager agrees contracts with Terms and conditions and stores signed contracts &amp; agreements.</b>	Paper copies and/or digital copies are kept by the <b>Business Manager</b> . These are often shared digitally with the Chair, Treasurer and any other appropriate committee member at the time of signing.	<b>7 years</b>
<b>Accounts (including receipts, bank statements &amp; bank account information, show budgets, annual and show specific account summaries &amp; Tax returns)</b>	As a record of all financial payments made and received by the Society to be audited independently, annually, and as and when requested by HMRC for Tax purposes	<b>Treasurer, Marketing &amp; events chair</b> has responsibility for the social committee account, overseen by the Treasurer, and Webmaster uploads audited accounts/summaries to the Society website.	Records are kept by the Treasurer (and by the Marketing & Events chair for our social committee account), Audited balances/summaries are uploaded onto the member's area of the Society website by the Webmaster (which has password protected access).	<b>7 years</b>
<b>Programmes</b>	Created for audiences watching our productions with information about the cast, the show and the Society. They are displayed on our website after the production is finished as a public and historic record of our productions.	Each production programme is the responsibility of an appropriate Designated person (programme co-ordinator) appointed by <b>the Marketing &amp; Events Committee</b> . This person obtains, collates and processes the information necessary (with the relevant individuals consent) to produce an informative programme. The Webmaster uploads the programmes onto the website after productions have finished.	Digital drafts and a final copy are stored by the designated programme co-ordinator on their personal computer. A digital copy is uploaded to The Society website (public access). Audience members who purchase a programme will retain their copy. Cast members are given a programme copy at the end of each production (if sufficient copies available).	<b>Ongoing as public record</b>
<b>Show and Cast Photos</b>	Taken to publicise our productions, to	The Society often engages the services of a Professional	Society Dropbox account (password protected access – only	<b>Publicity and programme photos- Ongoing as public</b>

	<p>use in our programmes and as a visual record of our productions. Cast photos are also used to aid production and Creative teams in the cast selection process and for identifying individual cast members</p>	<p>photographer for rehearsal, show and cast headshots. The images remain their property but are shared with the programme co-ordinator, Marketing &amp; Events Committee, Webmaster and sometimes cast themselves. Cast provide photos of themselves when auditioning which are held by the Membership secretary and shared with the production and Creative team for identification purposes.</p>	<p>shared with relevant/appropriate individuals), selected photos are displayed on the Society's Website and Facebook page (public access). Photos provided by cast are stored along with their audition forms by the membership secretary. These may be shared with audition panels and creative team as necessary for identification purposes.</p>	<p><b>record</b>, though they are updated regularly and can be removed at an individual's request <b>Photos provided by cast for auditions</b> are destroyed <b>6 months after a production is finished</b>.</p>
<p><b>Committee member photos</b></p>	<p>So members know who the individuals on their committees are.</p>	<p>Assistant Secretary, who produces the Society members' newsletter, uses the photos in a directory of who's who, at the end of the newsletter. Webmaster uploads (with consent) any photos to the Society website on committee "who's who" page.</p>	<p>Society members' newsletters, committee "who's who" page on Society's website</p>	<p>Displayed in newsletter and/or committee "who's who" page on Society website <b>as long as individuals serve on one of our Committees</b>.</p>
<p><b>Society Emails (Both sent and received)</b></p>	<p>For effective communication between the general public, Society members and its' committees, which is pivotal in the effective management of the Society and its productions and events. Emails are kept</p>	<p>Membership Secretary has access to the society email. CO2 chair, youth liaison officer and membership secretary have access to the CO2 email account. Webmaster, Secretary and Membership secretary receive messages from the</p>	<p>Email accounts they are sent to/from and/or forwarded to/from.</p>	<p>As deemed necessary/appropriate but <b>no more than 7 years</b>. Most communication is deleted on a regular basis. If it is show specific and/or contains personal data it is deleted immediately or up to 6 months after the relevant production.</p>

	as a record of these communications to refer back to if and when needed.	Society website. Marketing & events, Secretary, Business Manager and Chair have individual Society emails they are responsible for.		
<b>Annual General Meeting (AGM) Minutes &amp; reports</b>	Minutes are a record of discussion and voted decisions at annual general meetings of the Society for all members. Reports to members give information on what the Committees have done for the Society over each year.	Reports are written by the relevant committee members: Chair and/or Secretary for Executive committee report; CO2 Chair; Marketing & Events Chair; Youth Liaison Officer. Secretary/Assistant Secretary process and store minutes. The Webmaster uploads all minutes and reports onto the Society Website.	Paper and/or digital copies are kept by the secretary. Digital copies are also emailed to committee members and are uploaded onto the member's area of the Society website by the Webmaster (which has password protected access). Paper copies are also distributed to members without internet access/emails.	<b>Ongoing</b> access to all members
<b>Ethnicity and gender/sex details</b>	We occasionally ask members to declare their Ethnicity and/or gender/sex for ascertaining the demographic makeup of the Society & it's diversity. This is vital in evaluating our progress towards our Inclusion, Equality & Diversity aims (as detailed in our Inclusion, Equality & Diversity Policy, statement and Strategy)	Information is collected, stored and processed by our <b>Membership Secretary, Chair and/or Secretary</b> and may be shared with the Executive, CO2 and Marketing & Events committees as appropriate or applicable. Anonymous reports of the Society membership demographic may be shared with the wider membership, the public and outside organisations.	Paper and/or digital copies are kept by the <b>Membership Secretary, Chair and/or Secretary</b> . Anonymised data is kept digitally by individuals it is shared with for specific purposes and for as long as it is necessary for that purpose.	Individuals data is kept <b>for as long as they are a member</b> . Anonymous data will be stored on an <b>ongoing</b> basis as a matter of public record.
<b>Measurements of cast members</b>	Cast are measured for costume	<b>The wardrobe team</b> for the specific show takes & records cast	Paper and/or electronic records are held by the Wardrobe Team Leader	For the duration of the production and <b>up to 6 months after a</b>

	purposes for each individual show.	measurements.	and shared (anonymously) with specific costume hire companies, as appropriate for the purposes of acquiring the correct sized costumes.	<b>production finishes.</b> The information is then destroyed.
<b>Volunteer names and contact details</b>	To contact the individual regarding support they are offering or can provide to the Society and any productions or events	<b>Secretary, chair or Membership secretary</b> are responsible for contacting volunteers and will pass on details with consent to relevant individuals. Backstage volunteer contacts are passed to our <b>stage manager</b> who then manages them.	Electronically stored within the corresponding email browsers. Stage manager may keep a database of current volunteers' contacts on his personal computer.	For as long as they are interested in volunteering support to the Society and <b>up to 20 years after they've stopped</b> (as deemed necessary and agreed with the individual)
<b>Chaperone names, contact details and vetting information</b>	It's our legal obligation to vet Chaperones to safeguard our younger members (aged 16 years and under) during rehearsals and performances. Contact details are kept to keep in contact and provide relevant information on their roles and the productions they are chaperoning for.	<b>Membership secretary and Safeguarding Lead</b> process the information, store the contact details and <b>share Vetting information with ECC</b> , in order for ECC to carry out DBS checks and issue chaperone licenses. <b>No vetting information is stored by COS/CO2.</b>	Contact emails are stored electronically on the membership secretary's and/or safeguarding Lead's email account.	Contact details are stored for as long as they are interested in chaperoning for the Society and <b>up to 20 years after they've stopped</b> (as deemed necessary and agreed with the individual).