



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?
Members names & contact details	To contact members with information about the Society and its productions and events	Membership Secretary processes and stores this information & details are shared with the Secretary, Chair, Marketing Lead and Webmaster (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, and/or google drive, The Society's Website database, The Society's Email accounts address books, Mailchimp Members database	For as long as they are a member- they become past members when they stop renewing membership (see below)
Past members names & contact details	To contact past members with information about the Society and its productions and events	Membership Secretary processes and stores this information (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Mailchimp Members database	No more than 20 years (unless the member requests it to be deleted or details become invalid/out of date)
Committee names and contact details	To contact committee members with information about the	Secretary creates a contact list which all committee	Committee members Email accounts address books, Secretary holds	For as long as a member remains on a committee

	Society, its productions, events and committee meetings	members have access to (unless requested otherwise)	database/contact sheets for committees which are shared digitally and in paper form with other committee members	
Names and Email addresses (marketing list)	To contact interested parties about our productions and events	The Marketing & Events Committee manage our Mailchimp 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)	As long as the interested party agrees to receive emails (each email gives them the option to unsubscribe) or until the email address is no longer valid/in use.
Medical details & emergency contacts for cast members and volunteers of a production	To ensure cast members health, safety & well-being at all times	Membership Secretary processes and stores this information. It is passed to appointed Health & Safety representative (usually a member of the Exec Committee or Production Team attending rehearsal in place of membership secretary), and shared with First Aiders as necessary, for emergencies & to safeguard members wellbeing.	Electronic forms are stored on membership secretary's (and/or appointed Health & Safety representative's) google drive. 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. Access is given to appointed First Aiders as and when necessary to safeguard members Health, safety and wellbeing. If the membership secretary is not attending rehearsals they will pass the information to a trusted/appointed Health & Safety Representative	From the time the form is completed, for the duration of the production and up to 6 months after a production finishes. The information is then destroyed.

			(possibly a member of the Production Team or Exec Committee member).	
Consent and policy agreement forms	<p>Show specific-To ensure we have informed consent to take photos and videos of cast members during rehearsals & productions for publicity, programmes and choreography learning purposes,</p> <p>Ongoing membership- To ensure we have informed consent for holding contact information, To ensure all members agree to our rules, policies & procedures & codes of conduct</p> <p>Ongoing Volunteers and chaperones- to ensure all volunteers and chaperones agree to adhere to all relevant rules, policies & procedures & codes of conduct</p>	<p>Membership Secretary processes and stores this information.</p> <p>This task may be delegated to a member of the production team 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>Electronic forms are stored on membership secretary's google drive</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.</p> <p>This task may be delegated to a member of the production team 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>For production specific consent and agreement forms- From the time the form is completed, for the duration of the production and up to 6 months after a production finishes.</p> <p>The information is then destroyed.</p> <p>For ongoing membership consent and agreement forms—for as long as they are members and up to 20 years after they stop renewing membership (as deemed appropriate/necessary)</p> <p>For ongoing Volunteer & chaperone consent and agreement forms—for as long as they are volunteering and up to 20 years after they stop (as deemed appropriate/necessary)</p>
Committee meeting Minutes	As a record of discussion and decisions in Committee minutes which relate to the organisation and management of the Society	Secretary/Assistant Secretary processes and stores this information.	Paper copies and/or digital copies are held by the Secretary , Digital copies are emailed to all relevant committee members who may then keep their own records	7 years
Contracts	As a record of all terms & agreements signed on behalf of the Society for financial & legal purposes	Business Manager agrees contracts with Terms and conditions and stores signed contracts & agreements.	Paper copies and/or digital copies are kept by the Business Manager . These are often shared digitally with the Chair, Treasurer and any other appropriate committee member at the time of signing.	7 years

Accounts (including receipts, bank statements & bank account information, show budgets, annual and show specific account summaries & Tax returns)	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	Treasurer, Marketing & events chair 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).	7 years
Programmes	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 the Marketing & Events Committee . 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).	Ongoing as public record
Show and Cast Photos	Taken to publicise our productions, to 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	The Society often engages the services of a Professional photographer for rehearsal, show and cast headshots. The images remain their property but are shared with the programme co-ordinator, Marketing & Events Committee,	Society Dropbox account (password protected access – only 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	Publicity and programme photos- Ongoing as public record , though they are updated regularly and can be removed at an individual's request Photos provided by cast for auditions are destroyed 6 months after a production is finished .

		<p>Webmaster and sometimes cast themselves.</p> <p>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>secretary. These may be shared with audition panels and creative team as necessary for identification purposes.</p>	
Committee member photos	<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.</p> <p>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 as long as individuals serve on one of our Committees.</p>
Society Emails (Both sent and received)	<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 as a record of these communications to refer back to if and when needed.</p>	<p>CO2 chair, youth liaison officer and membership secretary have access to the CO2 email account.</p> <p>Marketing & Events committee have access to a society email account.</p> <p>Webmaster, Secretary and Membership secretary receive messages from the Society website.</p> <p>Marketing & events Lead, Secretary, Business Manager, Membership secretary, Safeguarding Lead,</p>	<p>Email accounts they are sent to/from and/or forwarded to/from.</p>	<p>As deemed necessary/appropriate but no more than 7 years.</p> <p>Most communication is deleted on a regular basis.</p> <p>If it is show specific and/or contains personal data it is deleted immediately or up to 6 months after the relevant production.</p>

		webmaster and Chair have individual Society emails they are responsible for.		
Annual General Meeting (AGM) Minutes & reports	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.	Ongoing access to all members
Equality Monitoring data: Ethnicity, gender/sex, age, marital status, sexual orientation, religion and any disability details	We occasionally carry out Equality Monitoring and ask members to declare their Ethnicity, gender/sex, age, marital status, sexual orientation, religion and/or any disability for ascertaining the demographic makeup of the Society & it's diversity. This is done with explicit consent and there is an option to not disclose this information or complete the form. 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 Membership Secretary, Chair, Secretary and/or Inclusion Lead and may be shared with the Executive, CO2 and Marketing & Events committees as appropriate or applicable and anonymously wherever possible. 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 Membership Secretary, Chair, Secretary and/or Inclusion Lead . 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.	Individual's data is kept for as long as they are a member . Anonymous data will be stored on an ongoing basis as a matter of public record.

Measurements of cast members	Cast are measured for costume purposes for each individual show.	The wardrobe team for the specific show takes & records cast measurements.	Paper and/or electronic records are held by the Wardrobe Team Leader and shared (anonymously) with specific costume hire companies, as appropriate for the purposes of acquiring the correct sized costumes.	For the duration of the production and up to 6 months after a production finishes. The information is then destroyed.
Volunteer names and contact details and vetting information	To contact the individual regarding support they are offering or can provide to the Society and any productions or events, We vet volunteers working with children aged 16 years and under, to fulfil our legal obligation to safeguard our younger members/participants during rehearsals and performances.	Secretary, chair, Membership secretary and/or safeguarding lead are responsible for contacting volunteers and will pass on details with consent to relevant individuals. Backstage volunteer contacts are passed to our stage manager and/or wardrobe lead who then manages them. Membership secretary and Safeguarding Lead process vetting information and may share with ECC , in order for ECC to support with DBS checks and issue chaperone licenses. Vetting information for DBS checks and chaperone licences is not stored by COS/CO2.	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 up to 20 years after they've stopped (as deemed necessary and agreed with the individual)
Chaperone names, contact details and vetting information	It's our legal obligation to vet Chaperones to safeguard our younger members/participants (aged 16 years and under) during rehearsals and	Membership secretary and Safeguarding Lead process the information, store the contact details and share Vetting information with ECC , in order for ECC	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 up to 20 years after they've stopped (as deemed necessary and agreed with the individual).

	performances. Contact details are kept to keep in contact and provide relevant information on their roles and the productions they are chaperoning for.	to carry out DBS checks and issue chaperone licenses. Vetting information for DBS checks and chaperone licences is not stored by COS/CO2.		
Contracted Individuals and companies names, contact details, vetting information and safeguarding checks	Contact details are kept to keep in contact and provide relevant information on their roles and the productions they are working on or may be interested in working on in the future. It's our legal obligation to safeguard our younger members (aged 16 years and under) during rehearsals and performances.	Membership secretary and Safeguarding Lead process the vetting information needed for DBS checks and may share with ECC , as necessary to support with DBS checks. Vetting information for DBS checks and chaperone licences is not stored by COS/CO2. Our Safeguarding Lead processes and stores completed safeguarding checks.	Contact details are electronically stored on Committee Members email accounts and address books. Paper or Electronic copies of Safeguarding checks are stored securely by our safeguarding lead.	Contact details are stored for as long as they are working with and/or are interested in working with/for the Society and up to 20 years after they've stopped (as deemed necessary and agreed with the individual). Safeguarding checks are kept for as long as the relevant individual is working with the Society and are reviewed annually.
COVID-19 test results	Individuals involved in a production are asked to take regular lateral flow tests and report the result to a named COS/CO2 representative In order to comply with COVID-19 specific risk assessments	Named COS/CO2 representative (usually a member of the Exec Committee or production team) will look at results and note they have been received. If individuals have chosen to share photos of the result on a closed society Facebook group, the administrator of that group will ensure the photos/posts are deleted once they are no longer needed to be viewed.	Electronic photos shared by email or electronic message are managed by the named representative/individual receiving them and are not stored once they are viewed. Individuals can choose to share photos of results on a closed society production Facebook group managed by listed Facebook group administrators (usually Exec Committee members or members of the production team). Paper/electronic copy check lists of results seen are kept and managed by the named	Photos shared directly with the named representative are deleted as soon as they have been viewed. Photos shared to a closed society Facebook group are deleted within or at the end of the production period , as close to the time they have been viewed by the named representative as possible.

			representative.	
Information on Financial circumstances (Bursary applications)	In order to process and make decisions on bursary applications, applicants may disclose details of their personal financial circumstances or be asked to disclose financial circumstances or provide proof of specific financial benefits they are entitled to, to assess eligibility and suitability for the bursary as necessary and appropriate.	Initial information is provided to the secretary or membership secretary but will be shared with all Executive Committee members responsible for making the application decisions.	Paper and/or digital copies are kept by the Membership Secretary or Secretary and when shared with Exec committee will be electronically stored within the corresponding email browsers. Electronic forms are stored on membership secretary's or secretary's google drive.	From the time the form is completed, for the duration of the production or bursary it relates to and up to 6 months after a production finishes. The information is then destroyed.