Charity No. 1198865

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	**Secretary processes and stores this information & details are shared with the Chair, CO2 Chair, CO2 Membership Secretary or CO2 Secretary, Business Manager, Marketing Lead and Webmaster** (webmaster shares responsibility for maintaining the website database, Marketing lead maintains our mailchimp database, CO2 chair and/or CO2 Membership Secretary or Secretary manages the CO2 database, Business Manager manages donation databases and Chair supports all individuals in their roles)	Membership forms completed by members are stored by the Secretary, Database stored on the Secretary's personal computer and/or google drive/OneDrive, The Society's Website database, The Society's Email accounts address books, Mailchimp Members database, Kindlink 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	**Secretary processes and stores this information** (Webmaster shares responsibility for maintaining the website database Marketing lead maintains our mailchimp database, Business Manager manages the Kindlink database, CO2 Chair and/or CO2 Membership Secretary/CO2 Secretary shares responsibility for the CO2 members database and Chair supports in all roles)	Membership forms completed by members are stored by the Secretary, Database on the Secretary's computer, The Society's Website database, The Society's Email accounts address books, Mailchimp Members database, Kindlink Database if they wish to remain as donors	**No more than 20 years** (unless the member requests it to be deleted or details become invalid/out of date)
Committee/Trustee names and contact details	To contact committee members/Trustees with information about the Society, its productions, events and committee meetings	**Secretary** creates a contact list which **all committee members have access to** (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	**For as long as a member remains on a committee/a trustee**
Trustee Personal Information for Charity Commission register & Society Bank Account	To fulfil a legal requirement for charities	**Chair** collates the information and shared with **the Charity Commission and Bank** who hold the information	The information is held electronically by the Chair on their personal device and/or their associated society online storage drive; on the web portal for the charity commission and by the Society's chosen Bank	**For as long as the person remains a Trustee or until the information requires updating. For names and dates of appointment kept on public record held by the Charity Commission, the data remains stored on an ongoing basis to comply with the law. For the Bank signatories, data is retained for as long as the individual remains a signatory**

				on the bank account.
Committee/Trustee conflict of interest declarations	To ensure conflicts of interest for our trustees are effectively managed and recorded for transparency should any issues arise, and to provide information to the Charity commission should any queries, challenges or investigations into conflicts of interest arise	**Secretary/Assistant secretary of any COS/CO2 committees** will hold records of completed declaration forms and transfer relevant information onto our conflicts of interest register. These can be accessed by our Chair/Business Manager/CO2 Chair to support maintaining them.	The information is held electronically on the Secretary/Assistant Secretary's personal device and/or an associated/the society's online storage drive.	**For 3 years after a Trustee/committee member ceases serving on any Society committee.**
Names and Email addresses (marketing list, non-members registering interest in upcoming audition information & general public enquiries)	To contact interested parties about our productions and events and respond to/have a record of enquiries	The **Marketing & Events Committee** manage our **Mailchimp** account. Interested parties sign up to receive emails themselves via our website/facebook page. Our Chair and Secretary have access to the account also. Those with access to the website, Society social media accounts and Society emails (usually committee members or appointed trusted individuals/members) can access, respond and store enquiries	Mailchimp database (password protected) Enquiries are held on our Society emails, social media accounts and website contact forms.	**As long as the interested party agrees to receive emails** (each email gives them the option to unsubscribe), **as long as necessary to respond to an enquiry/as requested by the person enquiring** or until the email address is no longer valid/in use. We will store email enquiries as per our email retention policy. We may retain enquiries for a longer period of time if legally required for evidence for a specific purpose or with consent. Non-member's requesting information on upcoming auditions

				details are kept until those specific auditions have been completed.
Medical details & emergency contacts for cast members and volunteers of a production	To ensure cast members health, safety & well-being at all times	**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 secretary), and shared with First Aiders as necessary, for emergencies & to safeguard members wellbeing.	Electronic forms are stored on Secretary's (and/or appointed Health & Safety representative's) google drive/OneDrive. Paper copies are stored by the Secretary or appointed representative 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 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 Secretary is not attending rehearsals they will pass the information to a trusted/appointed Health & Safety Representative (possibly a member of the Production Team or Exec Committee member).	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.
Consent and policy agreement forms	**Show specific**-To ensure we have informed consent to take photos and videos of cast members during	**Secretary processes and stores this information (for CO2 this may be the CO2 Chair or CO2 secretary).**	Electronic forms are stored on the Secretary's google drive/OneDrive. Paper copies are stored by the Secretary, lists of	**For production specific consent and agreement forms**-From the time the form is completed, for the duration of

	rehearsals & productions for publicity, programmes and choreography learning purposes, **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 **Ongoing Volunteers and chaperones**- to ensure all volunteers and chaperones agree to adhere to all relevant rules, policies & procedures & codes of conduct	This task may be delegated to a member of the production team or another appointed committee member in place of the Secretary if appropriate (individuals will be informed who holds/processes this information in this instance).	consent received may be created and stored by the Secretary for quick reference as necessary/appropriate. This task may be delegated to a member of the production team or another appointed committee member in place of the Secretary if appropriate (individuals will be informed who holds/processes this information in this instance).	the production and **up to 6 months after a production finishes**. The information is then destroyed. **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) **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)
Committee meeting Minutes & Agendas	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/shared 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 and/or Chair/CO2 Chair 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, Secretary, Treasurer, CO2 Chair (for CO2) and any other appropriate committee member at	**7 years**

			the time of signing. Copies may be kept by the named people above for their reference.	
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** has main responsibility but **Chair** also has access to the bank accounts and is shared some of this information to authorise payments. Webmaster uploads audited accounts/summaries to the Society website.	Records are kept by the Treasurer, Audited balances/summaries are uploaded onto the member's area of the Society website by the Webmaster (which has password protected access).	**7 years**
Invoices & Payment Details	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	These will be seen by the person an invoice is originally sent to before being passed on to **Treasurer, Chair other COS Bank account signatories** to process and authorise payments. A record of payment details may be kept by the Bank but this is controlled by **COS Bank account signatories**.	Society records are kept by the Treasurer and/or Chair, and accessed by COS Bank account signatories.	**7 years for Invoices. Payment details on the Bank account** may be kept for **up to 1 year** if we reasonably expect to make future payments to the same account holder.
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	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	**Ongoing as public record**

		consent) to produce an informative programme. The Webmaster uploads the programmes onto the website after productions have finished.	the end of each production (if sufficient copies available).	
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, Webmaster and sometimes cast themselves. In addition the Chair, CO2 Chair, Secretary and/or CO2 secretary may keep Headshots and any show photos for the Society archives, as necessary and appropriate, and these may also be used for future production programmes and/or future production teams for identification purposes. Cast provide photos of themselves when auditioning which are held by the Secretary (or CO2 Chair, CO2 Secretary or CO2 Membership Secretary for CO2)	Society Onedrive or Google Drive 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 Secretary. These may be shared with audition panels and creative team as necessary for identification purposes.	**Publicity and programme photos- Ongoing as public record,** though they are updated regularly and can be removed at an individual's request **Headshots & Show Photos** **Ongoing for Society Archives**, as deemed appropriate and necessary by Society officials maintaining the records, though they can be removed at an individual's request **Photos provided by cast for auditions** are destroyed **6 months after a production is finished.**

		and shared with the production and Creative team for identification purposes.		
Committee member/Trustee photos	So members know who the individuals on their committees and Trustees are.	Appointed member 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.	Society members' newsletters, committee "who's who" page on Society's website	Displayed in newsletter and/or committee "who's who" page on Society website **as long as individuals serve on one of our Committees.**
Society Emails (Both sent and received) and associated attachments	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. Some attachments are downloaded and saved by COS/CO2 personnel separately, depending on what they are/what they contain, and would be handled as per our records management policy and/or the relevant section in this retention schedule that they relate to individually.	CO2 chair & vice chair have access to the CO2 email account. CO2 secretary and/or membership secretary has access to a society email account. Marketing & Events committee have access to a society email account. Webmaster and Secretary receive messages from the Society website. Marketing & events Lead, Secretary, Assistant Secretary, Business Manager, Safeguarding Lead, Webmaster, Inclusion Lead, Funding co-ordinator, Treasurer, Chair, Stage Manager, Costume Lead and Props Hire Manager have individual	Email accounts they are sent to/from and/or forwarded to/from.	As deemed necessary/appropriate but **no more than 7 years.** 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.

		Society emails they are responsible for. There is also a dedicated attendance society email managed by a selected attendance team (see attendance data section for more information).		
Annual General Meeting (AGM) Minutes, Agendas & 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; 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 &	Information is collected, stored and processed by our **Chair, Secretary, CO2 Chair/CO2 Secretary and/or Membership 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	Paper and/or digital copies are kept by the **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. Data recorded on Kindlink will remain **as long as the individual wishes to remain a donor to the Society.**

	Diversity aims (as detailed in our Inclusion, Equality & Diversity Policy, statement and Strategy).	wider membership, the public and outside organisations. Gender information may be shared with our Business Manager for importing onto our donations/payments database-Kindlink with members permission.		
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 with the **costume lead/Wardrobe team leader** taking main responsibility.	Paper and/or electronic records are held by the Wardrobe Team Leader/Costume Lead and shared (anonymously where possible) with specific costume hire companies, as appropriate for the purposes of acquiring the correct sized costumes. Each costume company will have their own privacy policy and retention schedule and information on this can either be found on their websites and/or be provided to cast members by request/as necessary.	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	**Secretary, Chair, CO2 Chair 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**	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)

	members/participants during rehearsals and performances.	**wardrobe lead** who then manages them. **Chair/CO2 Chair 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.**		
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 performances. Contact details are kept to keep in contact and provide relevant information on their roles and the productions they are chaperoning for.	**Chair/CO2 Chair and Safeguarding Lead** process the information, store the contact details and **share Vetting information with ECC,** in order for ECC to carry out DBS checks and issue chaperone licenses. **Vetting information for DBS checks and chaperone licences is not stored by COS/CO2.**	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).
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.	**Chair/CO2 Chair 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	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

		completed **safeguarding checks.**		are reviewed annually.
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** but will be shared with all **Executive Committee members** responsible for making the application decisions.	Paper and/or digital copies are kept by the **Secretary** and when shared with **Exec committee** will be electronically stored within the corresponding email browsers. Electronic forms are stored on a Society or the Secretary's google drive/OneDrive.	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.
Donation Details	We process and store information on donations made from members/members of the public to manage our fundraising and apply for Gift Aid on eligible donations.	**Business Manager, Treasurer, Secretary, Funding Co-ordinator and Chair** manage the data on a third party database called **Kindlink.**	Information is stored on an online database called Kindlink.	**6 years.**
Attendance Data	We create registers for cast and crew who attend rehearsals and performances, and the time they arrive and leave. A record of cast attendance at rehearsals is processed and stored along with a record of lateness, notifications & reasons for absences, plus any instances of unauthorised absences, as necessary.	**Secretary** manages and stores the data in the first instance with assistance from appointed people on the committee, including the **Inclusion lead & Chair (as an attendance team)**. For CO2 the **CO2 secretary and/or membership Secretary and CO2 Chair** manage and store the data. Information on attendance is shared	Paper copies are used in the venues and the information is then copied into electronic form kept by the Secretary and Inclusion Lead. Email records are kept by the Secretary.	Paper copies are securely destroyed **6 months after the production**. Emails are only kept as long as relevant in line with our Society Email retention schedule – see above. Electronic attendance records are retained for **up to 7 years.**

		with **Executive committee** members and a summary may be shared with **future audition panels** as necessary. There is a dedicated attendance email for the society which the attendance team accesses and manages.		
Prospective creative and technical personnel CVs	Individuals expressing interest in paid creative and technical roles for the Society will sometimes be asked to send in a CV for consideration by the committee. Individuals also choose to send in this information for us to consider them for specific roles/productions. CVs are often sent as attachments and may be downloaded and saved by COS/CO2 personnel separately to look back on when needed (especially if sent in speculatively).	Any COS or CO2 personnel who receives the CV communication, which includes but is not limited to, the CO2 chair, CO2 secretary, Chair, Secretary, Assistant Secretary, Business Manager & Treasurer. CVs may be shared with all members of the COS and/or CO2 committee for consideration as necessary and appropriate.	Email accounts they are sent to/from and/or forwarded to/from. Secretary, Chair or other relevant committee members' personal computer/s and/or google drive/OneDrive.	As deemed necessary and/or appropriate but **no more than 7 years.**
Audition Information	Audition forms collect information from members & sometimes non-members wishing to audition for a specific show so we can organise auditions, provide the audition panel including the creative team with relevant information to inform casting and rehearsal schedules.	**Secretary** or an appointed **audition lead** from the executive committee and for CO2, the **CO2 chair, Vice-chair, secretary and/or membership secretary.** They will share some key information from the forms with **the audition panel**	Information is collected electronically by Microsoft and/or google forms and stored on the society one drive/google drive by the Secretary and CO2 chair and/or CO2 secretary or CO2 membership secretary.	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. For Non-Members their data is destroyed as soon as possible after the auditions and **no**

		including the **creative team.**		**later than 6 months afterwards.**