

# Disposal checklist

Task	Things to remember	Tips
Get senior management support	Highlight the benefits to the organisation such as increased efficiency and cost reduction	Try telling them what could go wrong (or indeed has gone wrong) if you don't do this. Highlighting the risks is sometimes a more effective approach
Get support from the business	Highlight the benefits to the business area such as making it easier to find, use and share the information they need	It may help to 'brand' the work in a slightly different way to gain interest and increase understanding, for example, instead of 'disposal' you might want to use the phrase 'What to keep'
Understand what your organisation does	Pay particular attention to core or statutory function	Use websites, for example .gov.uk, annual reports, mission statements and talk to business areas
Find out what information your organisation has	It is essential to work closely with business areas as they have knowledge of business processes and the information that they create/hold	Ask information representatives within business areas to help with this work if you have them
Find out where your information is held	Consider all digital sources and don't forget the lifecycle of the technology used and any interdependencies between systems	Ask your IT department for help with this
Document what you know in a spreadsheet or database	Appoint an owner and keep it up to date	It may make sense to have all this information in one place rather than in multiple spreadsheets
Understand the value of your information	Consider legislative record keeping requirements, business, historical and potential re-use value	Talk to business areas – their knowledge is vital
Decide how long it should be kept for	Certain types of information are subject to legislative record keeping requirements	You could consider having a catch all retention period that covers most information and then longer/shorter retention periods for the rest – an 80/20 approach
Ensure that staff across the organisation know what information they should be keeping and where	Build this into staff training in particular induction sessions for new staff  Keep promoting this – it is not a one off activity	Use materials such as desk guides, leaflets and posters and make use of the intranet
Decide on the trigger point for disposal	If closure of a folder is a trigger point then you need to actually close the folders in question or disposal cannot take place when required	Use simple trigger points such 'closure of folder' as they will be easier to implement
Where possible build disposal into your digital systems	The extent to which you can automate disposal will depend on the systems you use	When procuring digital systems always make sure that they can 'do' disposal
Start disposing of information	Disposal can mean 'delete' but it can also mean transferring information to another organisation, for example, The National Archives	Consider putting together a policy on deletion
Keep it up to date	Organisations and their information change so this is not a one off activity	Set up a regular process of review and disposal and appoint people to own and take this forward