

Records Management Project 2015

JISC Retention Schedule, adapted for University use

Schedule 4: External Relations

The assumption has been made that records disposal is based on a single activity at the end of each academic (AY) or financial year (FY), so unless otherwise stated values refer to **full** academic or financial years, plus the current academic or financial year.

EXAMPLE:

Procurement Records: Selection of Suppliers: Proposals

Recommended Retention Period = Creation +1 Financial Year

Therefore a record of a Supplier Proposal made on 23rd October 2009 should be retained until the end of the financial year 2010-11 (i.e. 31st July 2011).

Note: final column indicates source: J = JISC schedule; U = University schedule

4.1 Government & Regulator Relations

Records	Retention Period	Statutory Demand	Notes	Source
Management of relationships	Permanent	No		J
Monitoring of, and participation in, the development of policies which will affect the institution	Permanent	No		J

4.2 Institutional Relations

Records	Retention Period	Statutory Demand	Notes	Source
Management of relationships with other HEIs	Permanent	No		J
Negotiation and management of inter-university agreements	Termination of agreement +6 AY	No		J

Inter-university Agreements	Termination of agreement +6 AY	No		J
Planning, financing and management of co-operative ventures	Termination of agreement +6 AY	No		J
Joint Venture Agreements	Termination of Agreement +6 AY	No		J

4.3 Marketing

Records	Retention Period	Statutory Demand	Notes	Source
Design and control of the institution's corporate identity	Permanent	No		J
Designs	Permanent	No		
Design and distribution of promotional materials	Permanent	No		J
Designs	Permanent	No		
Identification and exploitation of promotional opportunities	Creation +5 AY	No		J
Planning and execution of marketing campaigns, and assessment of their impact	Permanent	No		
Marketing Plans	Permanent	No		J
Market Research Reports	Permanent	No		J

4.4 Public Relations

Records	Retention Period	Statutory Demand	Notes	Source
Planning and control of media communications	Permanent	No		J
Press Releases	Permanent	No		J
Monitoring and control of media coverage	Permanent	No		J
Press clippings	Permanent	No		J
Press coverage statistics	Creation +2 AY	No		J
Design of official publications	Permanent	No		J
Designs/layouts	Permanent	No		J

Design and management of internet sites	Permanent	No		J
Internet 'snapshots'	Permanent	No		J

4.5 Community Liaison

Records	Retention Period	Statutory Demand	Notes	Source
Monitoring of the local economy and job market	Creation +5 AY	No		J
Monitoring of, and participation in, local initiatives which provide learning opportunities for staff and students	Permanent	No		J
Providing support and assistance to local organisations and institutions	Permanent	No		J

4.6 Fundraising

Records	Retention Period	Statutory Demand	Notes	Source
Identification of fundraising opportunities	Creation +20 AY	No		J
Design and execution of fundraising campaigns, and assessment of their impact	Permanent	No		J
Fundraising Plans	Permanent	No		J
Promotional materials	Permanent	No		J
Promotional prospectuses	Permanent	No		J
Event statistics	Permanent	No		J
Management of relationships with individuals and institutions which provide funds	Termination of relationship +20 AY	No		J
Donor/Sponsor Summary records/Database	Termination of relationship +20 AY	No		J

4.7 Alumni Relations

Records	Retention Period	Statutory Demand	Notes	Source
Maintenance of alumni records	Permanent	No		J
Alumni summary records/database	Permanent	No		J
First Destination statistics	Permanent	No		J

Provision of support and assistance to alumni associations	Permanent	No		J
Organisation of special alumni events	Permanent	No		J
Management of relationship with alumni	Permanent	No		J
Alumni newsletter/magazines	Permanent	No		J

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