External Relations Retention Schedule

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Records Management Policy

Version Control and Approval

Version Number	Comments	Author	Date
V0.01	First draft of stand-alone retention schedule for consultation	David Jenkins (Records Manager); Felicity Lawrence (Global Business Operations Manager)	September 2020
V1.00	First version for approval	David Jenkins (Records Manager); Felicity Lawrence (Global Business Operations Manager)	June 2022
V2.00	Second version with some minor changes	David Jenkins (Records Manager); Felicity Lawrence (Head of Global Business Operations)	July 2024

Version Number	Approved by	Date
V1.00	Daniel Fitzgerald (Chief Marketing and Engagement Officer)	June 2022
V2.00	Felicity Lawrence (ERD Data Protection Lead)	July 2024

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Implementation Guidance

Principles to follow

- It is good practice to proactively dispose of records on a regular basis (at least once a year if not more frequently). This helps make the process more manageable by keeping the quantity of records in your systems/storage locations to a manageable volume. If no proactive disposal takes place then it can make carrying out a review of records complex and time consuming (typically coinciding with the need to move offices or cleanse data from a system).
- Disposal actions need to be carried out when records are no longer 'current' (for example when a student has completed their studies with the University then their records are no longer active and can be reviewed). Retention periods will start to apply once a 'trigger' has been reached.
- Retention rules apply to all information regardless of its format. This means that the same retention periods should apply to paper records as well as electronic records. The only exception to this might be when data has been extracted from a paper record and input into a system (i.e. transcribing information into a database and then regarding the information in this database as 'the record'). In cases where information has been transcribed it is usually beneficial to retain the paper original for a short period of time in case of any data quality concerns over the transcribed data.
- In order to make the proactive disposal of information easier it is good practice to store information in a way that supports the eventual disposal process. Examples might include arranging folders on the X:Drive by academic year so that a retention rule can be applied at the end of year. Similarly it is best practice to avoid large spreadsheets or database that include all of a School/Department's students over multiple cohorts as this can make the eventual disposal complex and time consuming, in these cases it is best practice to have a single spreadsheet/database based on a cohort year.
- The University Archives are the corporate memory of the University. Information transferred to the archive, in paper or digital form, is preserved permanently for staff, students, alumni and non-members of the University community to research within (subject to Information legislation). The Archives and Special Collections pages on the Library website tell you more about what we want to collect and how to transfer records, or you can email the team with any questions

Where to go for more information

- For any queries about retention periods that are not covered by this retention schedule or records management in general please contact Records Management.

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Contents

1. Managing university communications

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
1.01	University-wide strategic communications	Press releases	Permanent. Offer to Archives	Business Requirement	X:Drive; Archives and Special Collections
1.02	Managing routine University communications (internal and external)	Contact lists	Destroy 6 years from end of academic year	Business Requirement	Dotdigital system
1.03	Administering Unitemps (ad hoc student staff)	Recruitment documents, Contact details	Destroy 6 years from end of role/end of academic year	Limitations Act 1980	Inbox; OneDrive

2. The Centre for International Training and Education (CITE)

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
2.01	Administering the University of Sanctuary award and related activities	Reporting and analysis, promotional events, research	Destroy 6 years from end of academic year	Business Requirement	CITE
2.02	Handling enquiries relating to University of Sanctuary activities	Correspondence	Destroy 3 years from end of academic year	Business Requirement	
2.03	Supporting University of Sanctuary students	Case files, correspondence	Destroy 6 years from end of studies	Business Requirement	
2.04	Administering CITE summer schools and short courses	International Summer Programmes, Teacher Development Programmes, English and British Culture Programme	Destroy 6 years from end of studies	Limitations Act 1980	CITE Note: if any of the participants are under the age of 18 then records should be kept for 21 years from the individual's date of birth.
2.05	Administering CITE courses	MA TESOL; IELTS/OET; pre-sessional courses; CELTA courses; in-sessional courses; JEPs	Destroy 6 years from end of studies	Limitations Act 1980	CITE
2.06	Administering CITE free classes	CELTA free classes	Destroy 6 years from completion of class	Business Requirement	CITE
2.07	Administering Erasmus/Study Abroad activities (non-student related)	Planning documents	Destroy 6 years from end of academic year	Limitations Act 1980	CITE Note: Student data should be managed in accordance with the Student and Academic Administration Retention Schedule.

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3. Prospective student recruitment

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
3.01	Analysis of prospective students for admission reporting purposes (non-personally identifiable data)	Spreadsheets from Business Objects; reports from UCAS; Unibuddy data	Destroy 1 year from end of recruitment cycle	Business Requirement	Future Students Office X:Drive; Data Warehouse
3.02	Carrying out outreach activities to potential students	HEAT database; EMWPREP database	Destroy 6 years from end of academic year	Business Requirement	Future Students Office X:Drive; Admissions Email Inbox
3.03	Administering the relationship with students currently on foundation years with a conditional offer onto a UOL degree	Correspondence	Destroy 1 years from end of academic year	Business Requirement	Future Students Office (ab above)
3.04	Administering student ambassadors	Lists of ambassadors;	Destroy 6 years from end of role/end of academic year	Limitations Act 1980	Future Students Office X:Drive
3.05	Activities associated with conversion campaigns (non-personally identifiable data)	Spreadsheets from Business Objects	Destroy 6 years from end of academic year	Business Requirement	Future Students Office X:Drive
3.06	Activities associated with conversion campaigns (personally identifiable data)	Student applicant questions; Call centre data; UniBuddy	Destroy 1 year from the end of academic year	Business Requirement	Future Students Office X:Drive
3.07	Managing relationships with international recruitment agents	Commission Invoicing; Agent Lists	Destroy 7 years from end of academic year	Business Requirement	Future Students Office X:Drive
3.08	Administering Scholarship applications	Applications; videos; email correspondence; scoring documentation	Destroy 1 year from the end of academic year for unsuccessful candidates or 7 years from end of academic year for	Business Requirement	Future Students Office X:Drive

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
			successful candidates		

4. Marketing and engagement

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
4.01	Marketing and communication for teachers and advisors	Communications to teachers and advisors	Destroy on withdrawal of consent	Business Requirement	Note: Review annually to establish whether contact should be maintained.
4.02	Sending local recruitment data from events to third parties	Basic contact details for student recruitment	Destroy 3 years from end of academic year	Business Requirement	Azorus
4.03	Direct mail outs for promotional purposes	Mail outs; planning documents	Destroy 3 years from end of academic year	Business Requirement	
4.04	Analysing Website tracking information for statistical purposes	Analytics; statistics	Destroy 2 years from end of academic year	Business Requirement	
4.05	Market Research (aggregated data and reporting)	Reports	Destroy 6 years from completion of research	Business Requirement	
4.06	Market Research (personally identifiable supporting data)	Questionnaires	Destroy 1 year from completion of research	Business Requirement	
4.07	Managing consent for photographs and videos for marketing purposes	Consent forms	Destroy 6 years from expiry of consent	Limitations Act 1980	Note: Consent period to be outlined in the associated consent privacy notice.

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Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
4.08	Photographs and videos for marketing communications, and press purposes	Photographs	Permanent. Offer to Archives where relevant	Business Requirement	OneDrive
4.09	Monitoring media coverage of UOL	Monitoring information; reports	Review 6 years from end of academic year	Business Requirement	

5. University Promotional Events

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
5.01	Running summer schools (non-student data)	Planning documents	Destroy 6 years from end of annual programme	Business Requirement	
5.02	Running summer schools (student data)	Student files	Destroy 21 years from student's date of birth	Limitations Act 1980	
5.03	Signing up for university events	Sign up forms	Destroy 3 months from the end of the event	Limitations Act 1980	

6. Corporate Branding

Ref No.	Functional Description	Examples	Retention Period	Justification	Storage Location/Further Information
6.01	Guidelines on the correct use of the corporate identity	Guidance; Logos; Templates	Destroy 1 year from date superseded	Business Requirement	

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