

EXTERNAL AND PUBLIC RELATIONS

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MARKETING

Records	Retention Period	Citations and Notes	Action
Marketing Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's marketing strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's marketing strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to marketing.	Superseded + 3 years	JISC	Review
Market Research			
Records documenting the design and development of market research tools.	Completion of research + 5 years	JISC	Review
Market research data: data relating to identifiable individuals.	Completion of analysis of data	JISC	Destroy
Market research data: aggregated data and analyses.	Completion of research + 5 years	JISC	Review
Marketing Campaign Management			

Records	Retention Period	Citations and Notes	Action
Records documenting the design, implementation and review of marketing campaigns.	Completion of campaign + 3 years	JISC	Review
Corporate Identity and Brand Management			
Records documenting the design of UWTSD's corporate identity marks (logos etc.) and the development of style guides for use of these.	Superseded	JISC	Review
Advertising Management			
Records documenting the development, placement and impact of advertisements.	Current + 5 years	JISC	Review

PUBLIC RELATIONS

Records	Retention Period	Citations and Notes	Action
Public Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's public relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's public relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to public relations.	Superseded + 3 years	JISC	Review
Public Communications Management			
Enquiries from members of the public and the responses provided.	Last action on enquiry + 1 year	JISC	Review
Unsolicited feedback from members of the public, the internal handling of this feedback and the responses provided.	Last action on feedback + 1 year	JISC	Review
Records documenting the design and conduct of public surveys.	Completion of survey + 3 years	JISC	Review

Records	Retention Period	Citations and Notes	Action
Results of public surveys: individual responses.	Completion of analysis of survey responses	JISC	Destroy
Results of public surveys: summaries and analyses of responses.	Completion of survey + 3 years	JISC	Review
Complaints from members of the public, the internal handling of these complaints and the responses provided.	Last action on complaint + 1 year	JISC	Review
Public Events Management			
Records documenting the planning and impact/results of public events.	Completion of event + 3 years	JISC	Destroy
Records documenting the organisation and administration of public events.	Completion of event + 1 year	JISC	Destroy
Official Visits Management			
Records documenting the organisation and administration of official visits.	Completion of visit + 1 year	JISC	Destroy
Sponsorship Management			
Records documenting the arrangements for corporate	Termination of sponsorship + 6 years	Limitation Act 1980 c.58 s.5	Review

Records	Retention Period	Citations and Notes	Action
sponsorship of public events by UWTSD.			

MEDIA RELATIONS

Records	Retention Period	Citations and Notes	Action
Media Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's media relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's media relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to media relations.	Superseded + 3 years	JISC	Review
Media Communications Management			
Records documenting UWTSD's media contacts.	Superseded	JISC	Destroy
Records documenting the planning and organisation of media briefings.	Date of briefing + 1 year	JISC	Destroy
Transcripts of media briefings.	Date of briefing + 5 years	JISC	Destroy
Records documenting the planning and organisation of media interviews.	Date of interview + 1 year	JISC	Destroy

Records	Retention Period	Citations and Notes	Action
Transcripts of media interviews.	Date of interview + 5 years	JISC	Review
Press releases.	Current year + 5 years	JISC	Archive
Records documenting media enquiries, the internal handling of these enquiries and responses provided.	Last action on enquiry + 3 years	JISC	Destroy
Media Monitoring			
Records documenting the monitoring and analysis of media coverage of UWTSD.	Current year + 5 years	JISC	Review
Press cuttings.	Creation + 1 year	JISC	Review

SECTOR RELATIONS

Records	Retention Period	Citations and Notes	Action
HE Sector Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's HE sector relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's HE sector relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to HE sector relations.	Superseded + 3 years	JISC	Review
HE Sector Communications Development			
General communications with other HE/FE institutions, other educational institutions, professional associations and learned bodies.	Current year + 5 years	JISC	Review
Records documenting the production of publications specifically intended for the HE and/or FE sector(s).	Publication + 1 year	JISC	Destroy

Records	Retention Period	Citations and Notes	Action
Publications.	While current + 1 year	JISC	Archive
General enquiries from institutions and other bodies in the sector, the internal handling of these enquiries and the responses given.	Last action of enquiry + 1 year	JISC	Destroy
HE Sector Consultations Development			
Records documenting the preparation of UWTSD's formal responses to consultations conducted by HE/FE sector organisations (including records of internal consultation processes).	Last action on consultation + 1 year	JISC	Destroy
Records documenting UWTSD's formal responses to consultations conducted by HE/FE sector organisations.	Last action on consultation + 3 years	JISC	Review
HE Sector Reporting			
Records documenting the preparation and submission of reports to HE/FE regulatory bodies.	Submission of report + 3 years	JISC	Review
HE Sector Events Management			

Records	Retention Period	Citations and Notes	Action
Records documenting the planning and impact/results of events for the HE sector.	Completion of event + 3 years	JISC	Destroy
Records documenting the organisation and administration of events for the HE sector.	Completion of event + 1 year	JISC	Destroy
HE Sector Representation			
Records documenting UWTSD's membership of organisations.	Termination of membership + 1 year	JISC	Destroy
Records documenting UWTSD's participation in the activities of external organisations (including committees).	Termination of involvement + 1 year	JISC	Destroy
HE Sector Collaboration			
Records documenting the establishment of formal contractual relationships between UWTSD and other HE/FE institutions.	Termination of contractual relationship + 6 years	Limitation Act 1980 c.58 s.5	Destroy

GOVERNMENT AND PARLIAMENTARY RELATIONS

Records	Retention Period	Citations and Notes	Action
Government Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's government relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's government relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to government relations.	Superseded + 3 years	JISC	Review
Government Communications Management			
General correspondence with government bodies.	Current year + 5 years	JISC	Destroy
Requests for information from government bodies, the consideration of the requests, preparation of responses and the responses provided.	Last action on request + 5 years	JISC	Destroy
Government Consultations Management			

Records	Retention Period	Citations and Notes	Action
Records documenting the consideration and preparation of UWTSD's formal responses to consultations conducted by government bodies (including records of internal consultation processes).	Last action on consultation + 1 year	JISC	Destroy
Records documenting UWTSD's formal responses to consultations conducted by government bodies.	Last action on consultation + 5 years	JISC	Review
Government Reporting			
Records documenting the preparation and submission of reports to government bodies.	Submission of report + 3 years	JISC	Destroy
Government Inquiries/Investigations Management			
Records documenting UWTSD's participation in formal government or public inquiries.	Last action on inquiry + 10 years	JISC	Review
Parliamentary Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's parliamentary relations strategy and policies: key records.	Superseded + 5 years	JISC	Review

Records	Retention Period	Citations and Notes	Action
Records documenting the development and establishment of UWTSD's parliamentary relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to parliamentary relations.	Superseded + 3 years	JISC	Review
Parliamentary Communications Management			
General correspondence with parliamentary bodies.	Current year + 5 years	JISC	Destroy
Requests for information from parliamentary bodies, the consideration of the requests, preparation of responses and the responses provided.	Last action on request + 5 years	JISC	Review
Parliamentary Consultations Management			
Records documenting the preparation of UWTSD's formal responses to consultations conducted by parliamentary bodies (including records of internal consultation processes).	Last action on consultation + 1 year	JISC	Destroy

Records	Retention Period	Citations and Notes	Action
Records documenting UWTSD's formal responses to consultations conducted by parliamentary bodies.	Last action on consultation + 3 years	JISC	Review
Parliamentary Inquiries and Investigations Management			
Records documenting UWTSD's participation in formal parliamentary inquiries.	Last action on inquiry + 10 years	JISC	Review

COMMUNITY RELATIONS

Records	Retention Period	Citations and Notes	Action
Community Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's community relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's community relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to community relations.	Superseded + 3 years	JISC	Review
Community Communications Management			
Enquiries from members of the local community and the responses provided.	Last action of enquiry + 1 year	JISC	Review
Unsolicited feedback from members of the local community, the internal handling of this feedback and the responses provided.	Last action on feedback + 1 year	JISC	Review
Records documenting the design and conduct of community surveys.	Completion of survey + 3 years	JISC	Review

Records	Retention Period	Citations and Notes	Action
Results of community surveys: individual responses.	Completion of analysis of survey responses	JISC	Destroy
Results of community surveys: summaries and analyses of responses.	Completion of survey + 3 years	JISC	Review
Complaints from members of the local community, the internal handling of these complaints and the responses provided.	Last action on complaint + 1 year	JISC	Review
Community Events Management			
Records documenting the planning and impact/results of local community events.	Completion of event + 3 years	JISC	Destroy
Records documenting the organisation and administration of local community events.	Completion of event + 1 year	JISC	Destroy
Community Representation			
Records documenting UWTSD's membership of local community organisations.	Termination of membership + 1 year	JISC	Destroy
Records documenting UWTSD's participation in the activities of local	Termination of involvement + 1 year	JISC	Destroy

Records	Retention Period	Citations and Notes	Action
community organisations (including committees).			

STUDENTS' UNION

Records	Retention Period	Citations and Notes	Action
Students' Union Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's students' union relations strategy and policies: key records.	Superseded + 10 years	JISC	Review
Records documenting the development and establishment of UWTSD's students' union relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to students' union relations.	Superseded + 5 years	JISC	Review
Students' Union Code of Practice			
Records documenting the development and establishment of UWTSD's code of practice on the oversight of the operations and finances of its students' union, as required by Section 22(3) of the Education Act 1994.	Issue of revised Code of Practice + 1 year	JISC	Destroy
Code of Practice required by Section 22(3) of the Education Act 1994.	Superseded + 10 years	JISC	Review

Records	Retention Period	Citations and Notes	Action
Students' Union Constitution Review and Approval			
Records documenting the process of reviewing the students' union's constitution, as required by s. 22(2) of the Education Act 1994.	N/A	JISC <i>The governing body's formal review and approval of the students' union's constitution will be recorded in the minutes of the appropriate meetings of the governing body. These records will be retained with the records of the governing body.</i>	N/A
Students' Union Funding			
Records documenting the process of negotiating and agreeing funding to be provided by UWTSD to its students' union.	Current financial year + 1 year	JISC	Destroy
Students' Union Financial Monitoring			
Records documenting the process of reviewing the students' union's budgets, as required by s. 22(2) of the Education Act 1994.	N/A	JISC <i>The governing body's formal review and approval of the students' union's budgets will be recorded in the minutes of the appropriate meetings of the governing body.</i>	N/A

Records	Retention Period	Citations and Notes	Action
		<i>These records will be retained with the records of the governing body.</i>	
Records documenting the monitoring of the students' union's financial affairs, as required by s. 22(2) of the Education Act 1994.	N/A	JISC <i>The governing body's formal review and approval of the students union's financial reports will be recorded in the minutes of the appropriate meetings of the governing body. These records will be retained with the records of the governing body.</i>	N/A
Students' Union Operations Monitoring			
Records documenting the monitoring of elections to major offices in UWTSD's students' union, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).	N/A	JISC <i>The governing body's formal review of the students union's elections will be recorded in the minutes of the appropriate meetings of the governing body. These records will be retained with the records of the governing body.</i>	N/A
Records documenting the monitoring of students' union affiliations, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).	N/A	JISC <i>The governing body's formal review of the students union's affiliations</i>	N/A

Records	Retention Period	Citations and Notes	Action
		<i>will be recorded in the minutes of the appropriate meetings of the governing body. These records will be retained with the records of the governing body.</i>	
Records documenting the investigation and reporting on complaints against the students' union by independent investigators appointed by UWTSD's governing body.	Settlement of complaint + 6 years	Limitation Act 1980 c.58 s.5	Destroy

ALUMNI RELATIONS

For fundraising activities, see EXTERNAL AND PUBLIC RELATIONS - FUNDRAISING AND DONATIONS.

Records	Retention Period	Citations and Notes	Action
Alumni Relations Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's alumni relations strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's alumni relations strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to alumni relations.	Superseded + 3 years	JISC	Review
Alumni Records Administration			
Records containing personal data on individual alumni.	While current (or likely to be current)	JISC	Destroy
Summary (anonymised) statistical records of alumni.	Current year + 10 years	JISC	Review
Alumni Communications Management			

Records	Retention Period	Citations and Notes	Action
Records documenting the design, planning and production of official alumni communications.	Issue of communication + 1 year	JISC	Destroy
Alumni communications.	Issue + 1 year	JISC	Archive
Records documenting enquiries from alumni and the responses provided.	Last action on enquiry + 1 year	JISC	Review
Unsolicited feedback from alumni, the internal handling of this feedback and the responses provided.	Last action on feedback + 1 year	JISC	Review
Records documenting the design and conduct of alumni surveys.	Completion of survey + 3 years	JISC	Review
Results of alumni surveys: individual responses.	Completion of analysis of survey responses	JISC	Destroy
Results of alumni surveys: summaries and analyses of responses.	Completion of survey + 3 years	JISC	Review
Records documenting the handling of complaints from alumni.	Last action on complaint + 6 years	JISC	Review
Alumni Events Management			

Records	Retention Period	Citations and Notes	Action
Records documenting the planning and impact/results of UWTSD events for alumni.	Completion of event + 3 years	JISC	Review
Records documenting the organisation and administration of UWTSD events for alumni.	Completion of event + 1 year	JISC	Destroy
Alumni Support			
Requests from alumni associations for financial or other support, the internal handling of these requests and the responses provided.	Last action on request + 1 year	JISC	Destroy
Records documenting the administration of financial and other support to alumni organisations.	Current financial year +1 year	JISC	Destroy
Requests for contact details for alumni, action taken, and the responses provided.	Last action on request + 1 year	JISC	Destroy

FUNDRAISING AND DONATIONS

Records	Retention Period	Citations and Notes	Action
Fundraising Strategy, Policy and Procedures Development			
Records documenting the development and establishment of UWTSD's fundraising strategy and policies: key records.	Superseded + 5 years	JISC	Review
Records documenting the development and establishment of UWTSD's fundraising strategy, policies and procedures: working papers.	Issue of document + 1 year	JISC	Destroy
Master copies of procedures relating to fundraising.	Superseded + 3 years	JISC	Review
Fundraising Campaign Management			
Records documenting the design, conduct and summary results of fundraising campaigns.	Last action on campaign + 5 years	JISC	Review
Individual responses to fundraising campaigns.	Completion of analysis of data	JISC	Review
Donations Management			
Records documenting the management of UWTSD's	Duration of relationship + 6 years	Limitation Act 1980 c.58 s.5	Review

Records	Retention Period	Citations and Notes	Action
relationship with donors to UWTSD (other than in response to fundraising campaigns).			
Records documenting the process of making donations to third parties.	Last action on donation + 6 years	Limitation Act 1980 c.58 s.5	Review
Records documenting the handling of enquiries about making donations to UWTSD.	Last action on enquiry + 1 year	JISC	Destroy
Records documenting donations to UWTSD.	Current year + 5 years	JISC	Review