

03	Development and Alumni relations management						
Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
03.001	Alumni relations, Communications and Event Management	The function of managing the institution's relationship with its alumni.					
	Alumni communication	Alumni communications	Date of issue of communication	1 year	Destroy	Business requirement	Review for archival value
	Alumni communication	Records documenting the design, planning and production of official alumni communications, both one-off (e.g. notices of new alumni benefits or services) and regular (e.g. magazines);	Date of issue of communication	1 year	Destroy	Business requirement	
	Alumni communication	Records documenting enquiries from alumni and the responses provided.	Last action on enquiry	1 year	Destroy	Business requirement	
	Alumni feedback	Records documenting unsolicited feedback from alumni, the internal handling of this feedback and the responses provided.	Date of last action on feedback	1 year	Destroy	Business requirement	
	Alumni surveys	Records documenting the design and conduct of alumni surveys.	Date of survey completion of survey	3 years	Destroy	Business requirement	
	Alumni surveys	Results of alumni surveys: individual responses	Date of analysis of survey responses completion	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Alumni surveys	Results of alumni surveys: summaries and analyses of responses	Date of analysis of survey responses completion	3 years	Destroy	Business requirement	
	Alumni complaints	Records documenting the handling of complaints from alumni.	Date of last action on complaint	3 years	Destroy	Business requirement	Retention for a longer period may be appropriate if the complaint, or the handling of the complaint, could be a basis for legal action against the institution.
	Alumni events	Records documenting the planning and impact/results of institutional events for alumni.	Date of completion of event	3 years	Destroy	Business requirement	
	Alumni events	Records documenting the organisation and administration of institutional events for alumni.	Date of completion of event	1 year	Destroy	Business requirement	
	Alumni events - finance	Records documenting the administration of financial and other support given to individual alumni organisations.	End of current financial year	1 year	Destroy	Business requirement	
	Alumni Records Administration	Records containing personal data on individual alumni.	While current (or likely to be current)		Confidential destruction	Business requirement	Retention period must be in accordance with the principles of the Data Protection Act 1998 c.29

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Alumni Records Administration	Summary (anonymised) statistical records of alumni	End of current academic year	10 years	Destroy	Business requirement	
	Alumni Relations Policy Development: key records	Records documenting the development and establishment of the institution's alumni relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	Review for historical value.
	Alumni Relations Policy Development - working papers	Records documenting the development and establishment of the institution's alumni relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Alumni Relations Procedure Development	Records documenting the development of the institution's procedures relating to alumni relations.	Date of procedures issue	1 year	Destroy	Business requirement	
	Alumni Relations Procedure Development: key records	Master copies of procedures relating to alumni relations.	Date superseded	3 years	Destroy	Business requirement	Review for historical value.
	Alumni Relations Strategy Development: key records	Records documenting the development and establishment of the institution's alumni relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	Review for historical value.

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Alumni Relations Strategy Development: working papers	Records documenting the development and establishment of the institution's alumni relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
	Alumni Support	Records documenting requests from alumni associations for financial or other support, the internal handling of these requests and the responses provided.	Date of last action on request	1 year	Destroy	Business requirement	
	Alumni Support	Records documenting the administration of financial and other support to alumni organisations.	End of current financial year	1 year	Destroy	Business requirement	
	Alumni Support	Records documenting requests for contact details for alumni, action taken and the responses provided.	Date of last action on request	1 year	Destroy	Business requirement	
03.002	Community relations	The function of managing the institution's relationship with its local community.					

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Community Communications Management	Records documenting enquiries from members of the local community and the responses provided.	Date of last action	1 year	Destroy	Business requirement	
	Community Communications Management	Records documenting unsolicited feedback from members of the local community, the internal handling of this feedback and the responses provided.	Date of last action	1 year	Destroy	Business requirement	
	Community Communications Management	Records documenting the design and conduct of community surveys.	Completion of the survey	3 years	Destroy	Business requirement	
	Community Communications Management	Results of community surveys: individual responses	Completion of analysis of survey responses		Confidential destruction	Business requirement	
	Community Communications Management	Results of community surveys: summaries and analyses of responses	Completion of the survey	3 years	Destroy	Business requirement	
	Community Communications Management	Records documenting complaints from members of the local community, the internal handling of these complaints and the responses provided.	Date of last action on the complaint	1 year	Destroy	Business requirement	
	Community Events Management	Records documenting the planning and impact/results of local community events.	Date of completion of the event	3 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Community Events Management	Records documenting the organisation and administration of local community events.	Date of completion of event	1 year	Destroy	Business requirement	
	Community Relations Policy Development: key records	Records documenting the development and establishment of the institution's community relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Community Relations Policy Development: working papers	Records documenting the development and establishment of the institution's community relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Community Relations Procedure Development: working papers	Records documenting the development of the institution's procedures relating to community relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Community Relations Procedure Development: key records	Master copies of procedures relating to community relations.	Date superseded	3 years	Destroy	Business requirement	Review for historical value.
	Community Relations Strategy Development: key records	Records documenting the development and establishment of the institution's community relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	Review for historical value.

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes	
	Community Relations Strategy Development: working papers	Records documenting the development and establishment of the institution's community relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement		
	Community Representation	Records documenting the institution's membership of local community organisations.	Date membership terminated	1 year	Destroy	Business requirement		
	Community Representation	Records documenting the institution's participation in the activities of local community organisations (including committees).	Date membership terminated	1 year	Destroy	Business requirement		
03.003	Fundraising	The function of soliciting funds directly from organisations and individuals, and of managing relationships with donors.						
	Donations Management	Records documenting the handling of enquiries about making donations to the institution.	Date of last action on enquiry	1 year	Destroy	Business requirement		
	Donations Management	Records documenting donations to the institution.	End of current financial year	5 years	Destroy confidentially	Business requirement	A shorter/longer period may be appropriate for small/substantial donations.	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Fundraising Campaign Management	Records documenting the design, conduct and summary results of fundraising campaigns.	Date of last action on campaign	5 years	Destroy	Business requirement	
	Fundraising Campaign Management	Records containing details of individual responses to fundraising campaigns.	Date of completion of analysis of data				
	Fundraising Policy Development:key records	Records documenting the development and establishment of the institution's fundraising policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Fundraising Policy Development:working papers	Records documenting the development and establishment of the institution's fundraising policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Fundraising Procedure Development:working papers	Records documenting the development of the institution's procedures relating to fundraising.	Date procedures issued	1 year	Destroy	Business requirement	
	Fundraising Procedure Development:key records	Master copies of procedures relating to fundraising.	Date superseded	3 years	Destroy	Business requirement	Review for historical value.
	Fundraising Strategy Development:key records	Records documenting the development and establishment of the institution's fundraising strategy: key records.	Date superseded	5 years	Destroy	Business requirement	Review for historical value.

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Fundraising Strategy Development:working papers	Records documenting the development and establishment of the institution's fundraising strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
03.004	Government Relations Management	The function of managing the institution's relationships with government bodies.					
	Government Communications Management	Records documenting general correspondence with government bodies.	End of current academic year	5 years	Destroy	Business requirement	
	Government Communications Management	Records documenting requests for information from government bodies, the consideration of the requests, preparation of responses and the responses provided.	Date of last action on request	5 years	Destroy	Business requirement	
	Government Consultations Management:working papers	Records documenting the consideration and preparation of the institution's formal responses to consultations conducted by government bodies (including records of internal consultation processes).	Date of last action on consultation	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Government Consultations Management:key records	Records documenting the institution's formal responses to consultations conducted by government bodies.	Date of last action on consultation	5 years	Destroy	Business requirement	
	Government Inquiries/Investigations Management	Records documenting the institution's participation in formal government or public inquiries.	Date of last action on inquiry	10 years	Destroy	Business requirement	
	Government Relations Policy Development:key records	Records documenting the development and establishment of the institution's government relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Government Relations Policy Development:working papers	Records documenting the development and establishment of the institution's government relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Government Relations Procedure Development:working papers	Records documenting the development of the institution's procedures relating to government relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Government Relations Procedure Development:key records	Master copies of procedures relating to government relations.	Date superseded	3 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Government Relations Strategy Development:key records	Records documenting the development and establishment of the institution's government relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Government Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's government relations strategy: working papers.	Date superseded	1 year	Destroy	Business requirement	
	Government Reporting	Records documenting the preparation and submission of reports to government bodies.	Date report submitted	3 years	Destroy	Business requirement	(where these are not part of routine data collection - see MANAGEMENT INFORMATION COLLECTION, ANALYSIS & REPORTING).
03.005	HE/FE Sector Relations Management	The function of managing the institution's relationships with organisations in the HE and FE sectors.					
	HE/FE Sector Relations Policy Development:key records	Records documenting the development and establishment of the institution's HE/FE sector relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	HE/FE Sector Relations Policy Development:working papers	Records documenting the development and establishment of the institution's HE/FE sector relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	HE/FE Sector Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's HE/FE sector relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
	HE/FE Sector Collaboration	Records documenting the establishment of formal contractual relationships between the institution and other HE/FE institutions.	Date contractual relationship terminates	5 years	Destroy	Statutory	Prescriptions and Limitations (Scotland) Act 1973 c.52 and 1984 c.45
	HE/FE Sector Communications Development	Records documenting the institution's general communications with other HE/FE institutions, other educational institutions, professional associations and learned bodies.	End of current year	5 years	Destroy	Business requirement	
	HE/FE Sector Communications Development	Records documenting the production of publications specifically intended for the HE and/or FE sector(s).	Publication date	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	HE/FE Sector Communications Development	Publications	Date superseded	1 year	Destroy	Business requirement	
	HE/FE Sector Communications Development	Records documenting general enquiries from institutions and other bodies in the sector, the internal handling of these enquiries and the responses given.	Date of last action on the enquiry	1 year	Destroy	Business requirement	
	HE/FE Sector Consultations Management:working papers	Records documenting the preparation of the institution's formal responses to consultations conducted by HE/FE sector organisations (including records of internal consultation processes).	Date of last action on consultation	1 year	Destroy	Business requirement	
	HE/FE Sector Consultations Management:key records	Records documenting the institution's formal responses to consultations conducted by HE/FE sector organisations.	Date of last action on consultation	3 years	Destroy	Business requirement	
	HE/FE Sector Events Management	Records documenting the planning and impact/results of events for the HE sector.	Completion of event	3 years	Destroy	Business requirement	
	HE/FE Sector Events Management:working papers	Records documenting the organisation and administration of events for the HE sector.	Completion of event	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	HE/FE Sector Relations Procedure Development	Records documenting the development of the institution's procedures relating to HE/FE sector relations.	Issue of procedures	1 year	Destroy	Business requirement	
	HE/FE Sector Relations Procedure Development:key records	Master copies of procedures relating to HE/FE sector relations.	Date superseded	3 years	Destroy	Business requirement	
	HE/FE Sector Relations Strategy Development:key records	Records documenting the development and establishment of the institution's HE/FE sector relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	HE/FE Sector Reporting	Records documenting the preparation and submission of reports to HE/FE regulatory bodies.	Date report submitted	3 years	Destroy	Business requirement	The activities involved in 1) submitting statistical and other data and reports to HE/FE regulatory bodies 2) receiving data and reports from these bodies for institutional use.
	HE/FE Sector Representation	Records documenting the institution's membership of organisations.	Date membership terminated	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	HE/FE Sector Representation	Records documenting the institution's participation in the activities of external organisations (including committees).	Date membership terminated	1 year	Destroy	Business requirement	
03.006	MARKETING	The function of marketing the institution.					
	Advertising Management	Records documenting the development, placement and impact of advertisements.	Date superseded	5 years	Destroy	Business requirement	Review for historical value.
	Corporate Identity & Brand Management	Records documenting the design of the institution's corporate identity marks (logos etc.).	Date superseded		Destroy	Business requirement	Review for historical value.
	Corporate Identity & Brand Management	Records documenting the development of corporate style guides for official use of corporate identity marks.	Date superseded		Destroy	Business requirement	Review for historical value.
	Market Research	Records documenting the design and development of market research tools.	Date research completed	5 years	Destroy	Business requirement	
	Market Research	Market research data: data relating to identifiable individuals.	Date analysis of data completed		Confidential destruction	Business requirement	
	Market Research	Market research data: aggregated data and analyses.	Date research completed	5 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Marketing Campaign Management	Records documenting the design, implementation and review of marketing campaigns.	Date campaign completed	3 years	Destroy	Business requirement	
	Marketing Policy Development:key records	Records documenting the development and establishment of the institution's marketing policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Marketing Policy Development:working papers	Records documenting the development and establishment of the institution's marketing policies: working papers.	Date policy issued	1 year	Desroy	Business requirement	
	Marketing Procedure Development	Records documenting the development of the institution's procedures relating to marketing.	Date procedures issued	1 year	Destroy	Business requirement	
	Marketing Procedure Development:key records	Master copies of procedures relating to marketing.	Date superseded	3 years	Destroy	Business requirement	
	Marketing Strategy Development:key records	Records documenting the development and establishment of the institution's marketing strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Marketing Strategy Development:working papers	Records documenting the development and establishment of the institution's marketing strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
03.006	Media Relations Management	The function of managing the institution's relationships with the media.					
	Media Communications Management	Records documenting the institution's media contacts.	Date superseded		Destroy		
	Media Communications Management	Records documenting the planning and organisation of media briefings.	Date of briefing		Destroy	Business requirement	
	Media Communications Management	Transcripts of media briefings	Date of briefing		Destroy	Business requirement	
	Media Communications Management	Records documenting the planning and organisation of media interviews.	Date of interview	1 year	Destroy	Business requirement	
	Media Communications Management	Transcripts of media interviews	Date of interview	5 years	Destroy	Business requirement	
	Media Communications Management	Press Releases	End of current year	5 years	Destroy	Business requirement	Review for historical value if indexed.
	Media Communications Management	Records documenting media enquiries, the internal handling of these enquiries and responses provided.	Date of last action on enquiry	3 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Media Monitoring	Records documenting the monitoring and analysis of media coverage of the institution.	End of current year	5 years	Destroy	Business requirement	
	Media Monitoring	Press cuttings	Date of creation	1 year	Destroy	Business requirement	
	Media Relations Policy Development:key papers	Records documenting the development and establishment of the institution's media relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Media Relations Policy Development:working papers	Records documenting the development and establishment of the institution's media relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Media Relations Procedure Development:key records	Master copies of procedures relating to media relations.	Date superseded	3 years	Destroy	Business requirement	
	Media Relations Procedure Development;working papers	Records documenting the development of the institution's procedures relating to media relations.	Date procedures issued	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Media Relations Strategy Development:key records	Records documenting the development and establishment of the institution's media relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Media Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's media relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
03.007	PARLIAMENTARY RELATIONS MANAGEMENT	The function of managing the institution's relationships with <u>parliamentary bodies</u>.					
	Parliamentary Communications Management	Records documenting general correspondence with parliamentary bodies.	End of current year	5 years	Destroy	Business requirement	
	Parliamentary Communications Management	Records documenting requests for information from parliamentary bodies, the consideration of the requests, preparation of responses and the responses provided.	Last action on request	5 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Parliamentary Consultations Management:working papers	Records documenting the preparation of the institution's formal responses to consultations conducted by parliamentary bodies (including records of internal consultation processes).	Last action on consultation	1 year	Destroy	Business requirement	
	Parliamentary Consultations Management:key records	Records documenting the institution's formal responses to consultations conducted by parliamentary bodies.	Last action	3 years	Destroy	Business requirement	
	Parliamentary Inquiries & Investigations Management	Records documenting the institution's participation in formal parliamentary inquiries.	Last action on inquiry	10 years	Destroy	Business requirement	
	Parliamentary Relations Policy Development:key records	Records documenting the development and establishment of the institution's parliamentary relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Parliamentary Relations Policy Development:working papers	Records documenting the development and establishment of the institution's parliamentary relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Parliamentary Relations Procedure Development	Records documenting the development of the institution's procedures relating to parliamentary relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Parliamentary Relations Procedure Development:key records	Master copies of procedures relating to parliamentary relations.	Date superseded	3 years	Destroy	Business requirement	
	Parliamentary Relations Strategy Development:key records	Records documenting the development and establishment of the institution's parliamentary relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Parliamentary Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's parliamentary relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
03.008	PUBLIC RELATIONS MANAGEMENT	The function of raising and maintaining the institution's public profile, and of managing its relationships with the public.					

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Donations Management	Records documenting the management of the institution's relationship with donors to the institution (other than in response to fundraising campaigns).	End of relationship	5 years	Destroy	Statutory	Prescriptions and Limitations (Scotland) Act 1973 c.52 and 1984 c.45
	Donations Management	Records documenting the process of making donations to third parties.	Date of last action on donation	5 years	Destroy	Statutory	Prescriptions and Limitations (Scotland) Act 1973 c.52 and 1984 c.45
	Official Visits Management	Records documenting the organisation and administration of official visits.	Date of completion of the visit	1 year	Destroy	Business requirement	
	Public Communications Management	Records documenting enquiries from members of the public and the responses provided.	Date of last action on enquiry	1 year	Destroy	Business requirement	
	Public Communications Management	Records documenting unsolicited feedback from members of the public, the internal handling of this feedback and the responses provided.	Date of last action on feedback	1 year	Destroy	Business requirement	
	Public Communications Management	Records documenting the design and conduct of public surveys.	Date survey completed	3 years	Destroy	Business requirement	
	Public Communications Management	Results of public surveys: individual responses	Date analysis of data completed		Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Public Communications Management	Results of public surveys: summaries and analyses of responses	Date survey completed	3 years	Destroy	Business requirement	
	Public Communications Management	Records documenting complaints from members of the public, the internal handling of these complaints and the responses provided.	Date of last action on complaint	1 year	Destroy	Business requirement	
	Public Events Management	Records documenting the planning and impact/results of public events.	Date event completed	3 years	Destroy	Business requirement	
	Public Events Management	Records documenting the organisation and administration of public events.	Date event completed	1 year	Destroy	Business requirement	
	Public Relations Policy Development:key records	Records documenting the development and establishment of the institution's public relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	
	Public Relations Policy Development:working papers	Records documenting the development and establishment of the institution's public relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Public Relations Procedure Development	Records documenting the development of the institution's procedures relating to public relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Public Relations Procedure Development:key records	Master copies of procedures relating to public relations.	Date superseded	3 years	Destroy	Business requirement	
	Public Relations Strategy Development:key records	Records documenting the development and establishment of the institution's public relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Public Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's public relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
	Sponsorship Management	Records documenting the arrangements for corporate sponsorship of public events by the institution.	Date of sponsorship termination	5 years	Destroy confidentially	Statutory	Prescriptions and Limitations (Scotland) Act 1973 c.52 and 1984 c.45
03.009	Student Relations Management	The function of managing the institution's relationship with its student body.					

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Student Communications Management	Records documenting the establishment and operation of staff-student liaison committees.	Date the committee ends	3 years	Destroy	Business requirement	
	Student Communications Management	Records documenting the operation of staff-student liaison committees.	End of current academic year	3 years	Destroy	Business requirement	
	Student Communications Management	Records documenting the design and conduct of student surveys.	Date survey completed	5 years	Destroy	Business requirement	
	Student Communications Management	Results of student surveys: individual responses	Date analysis of data completed		Destroy	Business requirement	
	Student Communications Management	Results of student surveys: summaries and analyses of responses	Date survey completed	5 years	Destroy	Business requirement	
	Student Communications Management	Records documenting the design of, and overall response to, student suggestion schemes.	Date scheme closed	5 years	Destroy	Business requirement	
	Student Communications Management	Records documenting the handling of suggestions from individual students.	Date of last action	1 year	Destroy	Business requirement	
	Student Relations Policy Development:key records	Records documenting the development and establishment of the institution's student relations policies: key records.	Date superseded	5 years	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Student Relations Policy Development:working papers	Records documenting the development and establishment of the institution's student relations policies: working papers.	Date policy issued	1 year	Destroy	Business requirement	
	Student Relations Procedure Development	Records documenting the development of the institution's procedures relating to student relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Student Relations Procedure Development	Master copies of procedures relating to student relations.	Date superseded	3 years	Destroy	Business requirement	
	Student Relations Strategy Development:key records	Records documenting the development and establishment of the institution's student relations strategy: key records.	Date superseded	5 years	Destroy	Business requirement	
	Student Relations Strategy Development:working papers	Records documenting the development and establishment of the institution's student relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
	Students' Union Relations Strategy Development:key records	Records documenting the development and establishment of the institution's students' union relations strategy: key records.	Date superseded	10 years	Destroy	Business requirement	Review for historical value.

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Students' Union Relations Strategy Development: working papers:	Records documenting the development and establishment of the institution's students' union relations strategy: working papers.	Date strategy issued	1 year	Destroy	Business requirement	
	Students' Union Constitution Review & Approval	Records documenting the process of reviewing the students' union's constitution, as required by s. 22(2) of the Education Act 1994.			NA	NA	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.
	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.			NA	NA	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. These records will be retained with the records of the governing body.

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	Students' Union Financial Monitoring	Records documenting the monitoring of the students' union's financial affairs, as required by s. 22(2) of the Education Act 1994.			NA	NA	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.
	Students' Union Funding	Records documenting the process of negotiating and agreeing funding to be provided by the institution to its students' union.	End of current financial year	1 year	Destroy	Business requirement	
	Students' Union Operations Monitoring	Records documenting the monitoring of elections to major offices in the institution's students' union, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).			NA	NA	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.

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Students' Union Operations Monitoring	Records documenting the monitoring of students' union affiliations, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).			NA	NA	The governing body's formal review of the students union's affiliations 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.
	Students' Union Operations Monitoring	Records documenting the investigation and reporting on complaints against the students' union by independent investigators appointed by the institution's governing body.	Date complaint settled	5 years	Destroy	Statutory	Prescriptions and Limitations (Scotland) Act 1973 c.52 and 1984 c.45
	Students' Union Relations Policy Development:key records	Records documenting the development and establishment of the institution's policies on students' union relations: key records.	Date superseded	5 years	Destroy	Business requirement	
	Students' Union Relations Policy Development:working papers	Records documenting the development and establishment of the institution's policies on students' union relations: working papers.	Date policy issued	1 year	Destroy	Business requirement	

Ref.	Activity/ Records Series	Description/ Example Record Types from the McLellan Store	Trigger - event that prompts start of retention period	Retention Period	Disposal Action	Authority	Citation/ Notes
	Students' Union Relations Policy Development	Records documenting the development and establishment of the institution'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.	Date revised Code of Practice issued	1 year	Destroy	Business requirement	Education Act 1994 c. 30 does not prescribe a retention period.
	Students' Union Relations Policy Development	Code of Practice required by Section 22(3) of the Education Act 1994.	Date superseded	10 years	Destroy	Business requirement	
	Students' Union Relations Procedure Development:working papers	Records documenting the development of the institution's procedures relating to students' union relations.	Date procedures issued	1 year	Destroy	Business requirement	
	Students' Union Relations Procedure Development:key records	Master copies of procedures relating to students' union relations.	Date superseded	5 years	Destroy	Business requirement	