

**UNIVERSITY OF EDINBURGH**  
**RECORDS RETENTION SCHEDULE**

<b>Function:</b>		Planning					
<b>Business areas:</b>		Central planning section, colleges, schools and groups					
No	Map reference	Description	Held by	Disposal	Timing	Trigger	Notes
<b>Committee records which contain planning information</b>							
The minutes, agenda and papers of Court, the Principal's Strategy Group, Central Management Group and the Finance and General Purposes Committee are listed in this schedule for the sake of completeness. However, the official retention schedule for these records will be one that covers all the University's top-level committees.							
1.	A3-1-5; A7-1-4; A8-5-1	Approved Court minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of the minutes	
2.		Approved Court minutes, agenda and papers (website version)	Committee Secretary	Destroy	10 years		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
3.		Approved Court minutes, agenda and papers (electronic copy)	Committee Secretary	Destroy	1 year		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
4.		Approved Court minutes, agenda and papers (paper and electronic copies)	All others	Destroy	As soon as no longer required for personal reference		The only reason for keeping these is convenience of reference eg if there is not a complete accessible copy on the web
5.		All draft versions of Court minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of	Do not add to file except in rare cases

						final minutes	where the drafts show a dramatic change in policy on a major issue
6.	A1-1-1; A2-1-2	Approved Principal's Strategy Group (PSG) minutes, agenda and papers (paper final copy)	Committee Secretary	Central filing	2 years		
7.	A1-1-1; A2-1-2	Approved Principal's Strategy Group (PSG) minutes, agenda and papers (paper final copy)	Central filing	University Archives	10 years		
8.		Approved PSG minutes, agenda and papers (electronic copy)	Committee Secretary	Destroy	1 year		The only reason for keeping this is convenience of reference; the master copy is currently the paper one
9.		Approved PSG minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
10.		All draft versions of PSG minutes, agenda and papers in all formats	Anyone	Destroy		On approval of final minutes	Do not add to file except in rare cases where the drafts show a dramatic change in policy on a major issue
11.	A1-1-1; A2-1-1; A2-1-2; A3-1-5; A3-1-11; A6-1-7; A7-1-3; A7-1-4; A8-2-1	Approved Central Management Group (CMG) minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of the minutes	
12.	A1-1-1; A2-1-	Pre-2000/2001 approved CMG	Committee Secretary	Destroy	1 year		This copy is kept for

	1; A2-1-2; A3-1-5; A3-1-11; A6-1-7; A7-1-3; A7-1-4; A8-2-1	minutes, agenda and papers (paper final copy)						ease of reference only
13.	A1-1-1; A2-1-1; A2-1-2; A3-1-5; A3-1-11; A6-1-7; A7-1-3; A7-1-4; A8-2-1	Pre-2000/2001 approved CMG minutes, agenda and papers (paper final copy)	Central filing	Destroy	10 years			From 2000/2001 onwards the web copy of these documents will replace this file copy, which is kept for ease of reference only.
14.		Approved CMG minutes, agenda and papers (paper and electronic copies)	Meeting participants	Destroy	When no longer needed for personal reference			The only reason for keeping these is convenience of reference eg if there is not a complete accessible copy on the web
15.		Approved CMG minutes, agenda and papers (website version)	Committee Secretary	Destroy	10 years			The only reason for keeping this is convenience of reference; it cannot be the master copy
16.		All draft versions of CMG minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes		Do not add to file except in rare cases where the drafts show a dramatic change in policy on a major issue
17.	A3-1-5; A7-1-4	Approved Finance and General Purposes Committee (FGPC) minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of minutes		
18.		Approved FGPC minutes, agenda and papers (website version)	Committee Secretary	Destroy	10 years			The only reason for keeping this is convenience of

							reference; the master copy is held by the University Archivist
19.		Approved FGPC minutes, agenda and papers (electronic copy)	Committee Secretary	Destroy	1 year		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
20.		Approved FGPC minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
21.		All draft versions of FGPC minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes	Do not add to file except in rare cases where the drafts show a dramatic change in policy on a major issue
22.	A1-2-2; A1-2-3; A1-2-4; A1-2-8; A2-2-2; A2-2-5; A3-4-1; A3-7-1; A3-7-7; A6-1-4; A6-1-5; A8-6-2; A8-6-3	Approved College Planning & Review Committee (P&R) minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of minutes	
23.	A1-2-2; A1-2-3; A1-2-4; A1-2-8; A2-2-2; A2-2-5; A3-4-1; A3-7-1; A3-7-7; A6-1-4;	Approved College P&R minutes, agenda and papers (paper final copy or website version)	Committee Secretary	Destroy	5 years		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist

	A6-1-5; A8-6-2; A8-6-3						
24.		Approved College P&R minutes, agenda and papers (electronic copy)	Committee Secretary	Destroy	3 years		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
25.		Approved College P&R minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
26.		All draft versions of College P&R minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes	Do not add to file
27.	A1-2-1; A2-2-2; A2-2-5; A3-7-6; A6-1-4	Approved College Executive Group minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of final minutes	Only if records of substance are created. If the only product is an action list, this should not be offered to the University Archives
28.		Approved College Executive Group minutes, agenda and papers (paper final copy or any electronic copy)	Head of College	Destroy	CY+2		
29.		Approved College Executive Group minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
30.		All draft versions of College Executive	Anyone	Destroy	Immediate	On	Do not add to file

		Group minutes, agenda and papers in all formats			ly	approval of final minutes	
31.	A1-2-2; A1-2-5; A1-2-6; A1-2-7; A3-6-8; A3-7-2; A3-7-4; A6-2-4; A8-1-5; A8-8-3	Approved School Management Committee minutes, agenda and papers (paper final copy)	Committee Secretary	University Archives	Immediately	On approval of the final minutes	
32.		Approved School Management Committee minutes, agenda and papers (final paper copy, website or other electronic version)	Committee Secretary	Destroy	7 years		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
33.		Approved School Management Committee minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
34.		All draft versions of School Management Committee minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes	Do not add to file
35.	A6-3-2	Approved School Undergraduate Studies Committee minutes, agenda and papers (paper or electronic final copy)	School secretary	Destroy	7 years		The School Secretary in this case is keeping the central record of all significant school committees; in other schools this set might be kept by the committee secretary.

							The records have not been selected for the University Archives as the records of higher committees are preserved instead.
36.		Approved School Undergraduate Studies Committee minutes, agenda and papers (paper convenience copy)	Committee secretary	Destroy	1 year		
37.		Approved School Undergraduate Studies Committee minutes, agenda and papers (electronic copy where paper is the master)	Committee Secretary	Destroy	3 years		The only reason for keeping this is convenience of reference if the master copy is the paper final copy
38.		Approved School Undergraduate Studies Committee minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
39.		All draft versions of School Undergraduate Studies Committee minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes	Do not add to file
40.	A6-3-2	Approved School Postgraduate Studies Committee minutes, agenda and papers (paper or electronic final copy)	School secretary	Destroy	7 years		The School Secretary in this case is keeping the central record of all significant school committees; in other schools this set might be kept by the committee secretary. The records have not

							been selected for the University Archives as the records of higher committees are preserved instead.
41.		Approved School Postgraduate Studies Committee minutes, agenda and papers (convenience copy)	Committee secretary	Destroy	1 year		
42.		Approved School Postgraduate Studies Committee minutes, agenda and papers (electronic copy where paper is the master)	Committee Secretary	Destroy	3 years		The only reason for keeping this is convenience of reference if the master copy is the paper final copy
43.		Approved School Postgraduate Studies Committee minutes, agenda and papers (paper and electronic copies)	All others	Destroy	Immediately	When no longer required for personal reference	
44.		All draft versions of School Postgraduate Studies Committee minutes, agenda and papers in all formats	Anyone	Destroy	Immediately	On approval of final minutes	Do not add to file
<b>Core records which contain planning information</b>							
45.	A7-1-3	University Bulletin	CPA	University Archives	Immediately	On publication	
46.	A7-1-3	University Bulletin	Planning Section copy	Destroy	2 years		The only reason for keeping this is convenience of reference
47.	A1-2-4	College newsletter	College Registrar	University Archives	Immediately	On publication	



48.	A1-2-4	College newsletter	College Registrar	Destroy	5 years		
49.		College newsletter	All other copies	Destroy	Immediately	When no longer required for personal reference	
<b>Developing strategic priorities</b>							
50.	A1-2-1; A7-1-4; A7-1-6	University strategic plan	Planning Section website	Destroy	6 years		Web version made available for convenience of reference
51.	A1-2-1; A7-1-4; A7-1-6; A7-1-11	University strategic plan	Glossy copy held by Planning Section	University Archives	Immediately	On publication	
52.	A1-2-1; A7-1-4; A7-1-6; A7-1-11	University strategic plan	Glossy copy held by Planning Section	Destroy	6 years		
53.	A7-1-10	University strategic plan, design proofs	Planning Section	Destroy	When final version produced		
54.		University strategic plan	All other copies	Destroy	As soon as no longer needed for personal reference		The only reason for keeping these is convenience of reference eg if there is not a complete accessible copy on the web
55.	A7-1-3	All draft versions of strategic plan (including supplementary material for SHEFC conditions of grant)	Planning Section Intranet	Destroy	1 year		
56.		Supplementary material for SHEFC conditions of grant	Planning Section Intranet	Review	3 years		Exact nature of this information can vary from year-to-year, and

							so decisions on whether or not to transfer to University Archives must be taken on a case-by-case basis
57.	A7-1-6	Feedback from SHEFC on strategic plan	Planning Section files	Destroy	3 years		This is a standard letter to all universities.
58.	A7-1-8; A7-1-9	Working papers for publication of strategic plan, including cost estimate, timetable	Planning Section paper files and electronic copies on Planning Section intranet	Destroy	CY+1		
59.	A1-2-1; A7-1-2	Final paper version of College annual plan (if not part of formal committee minutes)	College Registrar	Destroy	10 years	From year covered by plan	No need to transfer this copy to University Archives as a copy is included in CMG minutes
60.	A1-2-1; A6-1-7	Final version of College annual plan	College website	Destroy	3 years		Web version made available for convenience of reference
61.		Final paper version of College annual plan (if not available online)	All recipients who need it for reference purposes	Destroy	As soon as no longer required for reference purposes		The only reason for keeping these is convenience of reference eg if you will not always be able to access the web version
62.		Final electronic version of College annual plan	College Registrar	Destroy	CY+1		The only reason for keeping this is convenience of reference as the master copy is the paper final copy
63.		All other copies of College annual plan	Anyone	Destroy	As soon as no		Only keep while convenient for personal

					longer required for reference purposes		reference purposes
64.	A7-1-2	Executive summaries of College annual plan (planning submission)	Planning Section Website	Destroy	CY+1		
65.	A6-1-4; A6-1-5; A6-1-6; A7-1-1; A7-1-2	All draft versions of College annual plan	College Registrar	Destroy	When final version available		
66.	A7-1-1	Revised college plan compiled following discussions with Director of Planning and Senior Vice-Principal	Planning Section Intranet	Destroy	At end of current year		
67.		All other draft versions of College annual plan	All other recipients	Destroy	When plan is finalised		
68.	A1-2-1; A6-2-5	Final paper version of school annual plan (if not part of formal committee minutes)	College Registrar	University Archives	Immediately	When plan is finalised	
69.		Final version of school annual plan	School website, school administrator and College Registrar	Destroy	5 years		The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
70.		Final electronic version of school annual plan	College restricted drive	Destroy	CY+1	Completion of next planning round	The only reason for keeping this is convenience of reference; the master copy is held by the University Archivist
71.		All other copies of final version of school annual plan	Anyone	Destroy	Immediately	When no longer	

						required for personal reference	
72.	A6-2-3	All draft versions of school annual plan	School administrator	Destroy	CY+1	Completion of next planning round	All other copies to be kept only so long as is required for personal reference; ideally they should be destroyed at the end of the planning round
73.	A6-3-6	Final paper version of group annual plan (if not part of formal committee minutes)	School administrator and Group secretary	Destroy	1 year		If main decisions are not carried forward into school annual plan, one copy should be transferred to the University Archive at the time the plan is finalised. Not all Groups will have an annual plan.
74.		Final electronic version of group annual plan	School administrator on school shared drive	Destroy	1 year		The only reason for keeping this is convenience of reference as the master copy is the paper final copy
75.		All other copies of final version of group annual plan	Anyone	Destroy	Immediately	When no longer required for personal reference	
76.	A6-3-4	All draft versions of group annual plan	Group secretary	Destroy	CY+1	Completion	

						n of next planning round	
77.		All draft versions of group annual plan	Anyone other than Group secretary	Destroy	When plan is finalised		
78.	A1-2-2; A1-2-4; A6-1-3; A6-1-9	College level working papers, including discussion of college strategic priorities and communication of strategic priorities	Head of college	Destroy	CY+1	Completion of next planning round	These records either duplicate information held elsewhere, or are fragmentary e-mail exchanges which do not provide evidence of the decision-making process. Anything more substantive should be offered to the University Archive for review.
79.		College level working papers, including discussion of college strategic priorities and communication of strategic priorities	All others	Destroy	Immediately	When no longer required for personal reference	
80.	A1-2-5; A6-1-10; A6-2-4	School level working papers, including discussion of strategic priorities by e-mail or at away days	School Administrator/Head of School	Destroy	CY+1	Completion of next planning round	These records either duplicate information held elsewhere, or are fragmentary e-mail exchanges which do not provide evidence of the decision-making process. Anything more substantive should be offered to the

							University Archive for review.
81.		School level working papers, including discussion of school strategic priorities by e-mail, or at away days	All others	Destroy	Immediately	When no longer required for personal reference	
82.	A6-3-2	Group level working papers, including discussion and approval of course proposals	Person making proposals	Destroy	CY+1	Completion of next planning round	
83.	A6-3-2	Group level working papers, including discussion and approval of course proposals	All others	Destroy	Immediately	When no longer required for personal reference	
<b>Monitoring progress</b>							
84.	A8-1-2; A8-1-3	Accountability items and request for progress report	Planning Section intranet	Destroy	CY+1		
85.	A8-1-2; A8-1-3	Accountability items and request for progress report	All other copies	Destroy	Immediately	On completion of task	
86.	A8-1-4	Working papers for compilation of accountability return at school and college level	All copies	Destroy	CY+1		
87.	A8-1-6	College accountability report	Planning Section paper copy	University Archives	CY+2		
88.	A8-1-6	College accountability report	College copy and Planning Section electronic copies	Destroy	CY+2		
89.	A8-4-1	List of strategic and other major issues emerging from the planning round and progress on these: year end version	CMG website	University Archives	CY+2		
90.	A8-4-1	List of strategic and other major issues emerging from the planning round and	CMG website	Destroy	End of year		

		progress on these: mid-year versions					
91.	A8-5-1	Balanced scorecard performance indicators	Planning Section website	Review	CY+5		Retention period to be reviewed as scorecards till under development
92.	A8-2	Recruitment progress reports (Aug)	Planning Section files	Destroy	CY+1		
93.	A8-2	Recruitment progress reports (Aug)	All other copies	Destroy	As soon as no longer required for personal reference		The only reason for keeping these is for personal reference
94.	A8-2-1	Analyses of intake targets, including v actuals and those of College Support Team intranet	Planning Section website	Destroy	CY+2		
<b>Managing the planning process</b>							
95.	A2-1-2; A2-2-1; A2-2-5; A6-2-1	Planning timetable and any revised versions (central and college)	Relevant website (at central and college level)	Destroy	CY+1		If no web version is available, keep master electronic version
96.	A2-1-3; A2-2-1; A2-2-5; A6-2-1	Planning guidance and any revised versions (central and college)	Relevant website (at central and college level)	Destroy	CY+1		If no web version is available, keep master electronic version
97.	A2-2-1; A6-2-1	Covering correspondence for timetable and guidance	Master electronic copy	Destroy	CY+1		
98.	A2-2-4; A6-2-1	All other copies of documents listed above	All others	Destroy	No later than CY+1		These are working papers only, and should not be filed. They are kept for personal reference purposes only.
<b>Developing the budget</b>							
99.	A3-1-5; A3-2-4	Final agreed budget showing baselines and adjustments: final version	Planning Section website	Destroy	CY+5		
100.	A3-1-5; A3-2-4	Final agreed budget showing baselines and adjustments: other versions	Planning Section website	Destroy	CY+2		

101.	A3-1-5	Agreed University budget, showing income and expenditure and single line budgets	Planning Section website	Destroy	CY+2		The master version is kept by Finance; this copy is kept as a communication vehicle
102.		Draft University budget, showing income and expenditure and single line budgets (produced Nov)	Planning Section website	Destroy	CY+2		The master version is kept by Finance; this copy is kept as a communication vehicle
103.		Calculation of NPRAS marginal adjustments and additional allocations: final version	Planning Section website	Destroy	CY+2		
104.	A2-1-1; A3-1-4; A3-1-5	Draft budgets, budget priorities and global NPRAS calculations	Planning Section – electronic masters	Destroy	CY+1		
105.		Calculations relating to NPRAS space incentive budgetary adjustments	Planning Section website	Destroy	CY+2		
106.		Ad hoc calculations relating to university budget (e.g. decisions on indirect cost payments, Staff Benefit Scheme contributions increases)	Planning Section website	Destroy	CY+2		
107.	A3-1-1; A3-1-2; A3-1-3	Central working papers, including e-mail discussions between Director of Planning and Finance, Human Resources, lobbying from Heads of Colleges etc	Planning Section files, Head of Planning's e-mails	University Archives	CY+1		University Archivist may destroy some material.
108.		Other parties' copies of central working papers	All others	Destroy	CY+1		
109.		College and support group draft planning submissions	All copies	Destroy	When final plans approved		
110.	A3-1-9	SHEFC grant letter	Central Filing	Destroy	CY+10		
111.	A3-1-9	SHEFC grant letter	All other copies	Destroy	Immediately	When no longer needed for personal reference	



112.	A3-6-3	Estimate of in-year budget adjustment that the school can expect to receive	Anyone	Destroy	Immediately	On confirmation of actual adjustment	
113.	A3-4-2	Adjusted school budgets following allocation of in year adjustment	College website	Destroy	CY+3		If no electronic copy is widely available, then school administrators and college will need to keep their own copies for CY+3
114.	A3-4-3	Communication of adjusted budgets to schools	College Registrar	Destroy	CY+3		If a separate document
115.	A3-5-1	Applications to central funding reserve and rules for applications	College Registrar; centre	Destroy	1 year	After completion of funding term	
116.	A3-6-1; A3-6-2	Working paper for allocation of school budgets, such as group statement of needs, requests for estimates, discussions of budgets	School administrator and Group secretary	Destroy	CY+1		Other copies should be kept only so long as is necessary for personal reference
117.	A3-6-1; A3-6-2; A3-6-5	Working paper for allocation of school budgets, such as group statement of needs, requests for estimates, discussions of budgets	All others	Destroy	Immediately	When no longer required for personal reference	
118.	A3-3-2	Indicative school budgets	Anyone	Destroy	Immediately	On receipt of actual budget	
119.	A3-6-4; A3-6-6; A3-6-7	Draft school budgets	School administrator	Destroy	CY+1		Other copies should be kept only so long as is necessary for personal

							reference
120.	A3-6-8	Final school budgets	School administrator	Destroy	CY+1		Other copies should be kept only so long as is necessary for personal reference
121.	A3-7-8	School bids for additional college funds: awarded bids and confirmation of award	College office, School administrator and recipients of funding	Destroy	1 year	After completion of funded project	Other copies should be kept only so long as is necessary for personal reference
122.	A3-7-4	School bids for additional college funds: unsuccessful bids	School administrator and bidders for funding	Destroy	CY+1		Other copies should be kept only so long as is necessary for personal reference
123.	A3-7-3	School bids for additional college funds: proposals not put forward to college	School administrator and bidders for funding	Destroy	CY+1		Other copies should be kept only so long as is necessary for personal reference
124.	A3-7-6	College assessment of bids, summaries and recommendations	College Registrar (if not part of P&R Committee papers)	Destroy	CY+1		If not kept as part of committee minutes
125.	A3-8-1; A3-8-2; A3-8-3; A3-8-4; A3-8-5; A3-8-6	Subject planning for teaching workload, including projections of workload, assessment of ability to cover workload, casual teaching requirements, statements of need	School administrator	Destroy	CY+1		
126.		Subject planning for teaching workload, including projections of workload, assessment of ability to cover workload, casual teaching requirements, statements of need	Other parties	Destroy	Immediately	When no longer required for personal reference	
127.	A4-1-5	Fee incentive scheme calculations	Planning Section website	Destroy	CY+5		
128.	A3-2-2	Income & expenditure attribution model: all versions	Planning Section website	Destroy	CY+5		
129.	A3-2-3	Indirect cost recovery finance date for	Planning Section	Destroy	CY+5		

		previous and current year: all versions					
130.	A3-1-7; A3-2-4	Projections of fee income and indirect cost recovery: final version	Planning Section website	Destroy	CY+5		
131.	A3-1-8	Projections of fee income and indirect cost recovery: college versions	Head of College, Accountant, Registrar	Destroy	CY+1		Try to minimise duplication by saving this to a shared drive and keeping only one copy
<b>Financial monitoring by colleges and schools</b>							
132.	A8-6-1	Requests to HR and payroll detailing changes required to data	College copy	Destroy	3 years		
133.	A8-6-1	Salary forecasts	College Office and School Administrator	Destroy	5 years		
134.	A8-8-1; A8-8-2	Financial updates and financial reports	Budget administrator (may be school administrator)	Destroy	5 years		
135.	A8-8-4; A8-8-5	Detailed breakdown of sub-school budgets (including groups)	School administrator, budget administrator	Destroy	2 years		
<b>Data analysis</b>							
136.	A3-1-9; A8-3-3	Early stats returns	Spreadsheet on Planning Section shared drive	Destroy	CY+4		
137.	A8-3-6	Near final/final SHEFC return for student number projections	Planning Section shared drive	Destroy	5 years		
138.	A8-3-2	HESA listing	Planning Section shared drive	Destroy	4 years		
139.	A4-2-2	Final HESA student return	Registry, Finance, HR, Registry, Careers Service, Finance	University Archive	5 years		
140.	A4-2-3	HESA sectoral statistics	Planning Section Intranet	University Archive	10 years		Requires weeding
141.	A4-2-3	Comparative statistics from HESA and SHEFC final returns	Planning Section Intranet	Destroy	2 years	After reconciliation finalised	
142.	A4-2-4	Reconciliation response to SHEFC	Planning Section Intranet	Destroy	5 years		
143.	A8-3-7	Medical student return to HEFCE	Planning Section paper files	Destroy	5 years		
144.							
145.	A4-3-3	Teaching load data	Planning Section website	Destroy	10 years		

146.	A4-3-4; A4-1-2	Teaching load figures for income and expenditure attribution model	Planning section shared drive	Destroy	CY+1		
147.	A4-1-2; A4-3-4	Teaching load figures: all other versions	Planning Section shared drive	Destroy	CY		
148.	A4-3-5	Amendments to student data		Destroy	Immediately	On confirmation that amendments have been made	
149.	A4-3-2	Teaching load enquiries: response and working papers	Planning Section	Destroy		When new event produced	
150.	A4-3-6	Student staff ratios	College administrator	Destroy	10 years		
151.	A4-3-6	Student staff ratios	School administrator	Destroy	5 years		
152.	A4-3-6	Student staff ratios	All other copies	Destroy	Immediately	When no longer required for personal reference	
153.	A8-7-1; A8-7-2	Student numbers data	Course secretaries	Destroy	1 year		
154.	A8-7-3; A8-7-5	School teaching workload data	School administrator	Destroy	3 years		
155.	A8-7-4	Queries about school teaching workload data	School administrator and heads of group	Destroy	Immediately	On resolution of query	
156.	A3-1-6	Diagonal tables; version used to set budgets	Planning Section website	Destroy	CY+2		
157.	A3-2-1; A4-1-2	Diagonal tables; version used for inputting to income & expenditure attribution model for calculating in-year NPRAS adjustments	Planning Section website	Destroy	CY+1		
158.	A4-1-2; A8-2-	Diagonal tables; end of year version	Planning Section website	Destroy	CY+1		

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159.	A4-1-2	Diagonal tables: all other versions	Planning Section	Destroy	CY		
160.	A3-1-9	RAE results report	Planning Section	Destroy	CRAE+2 RAEs		Other copies should be kept only so long as is necessary for personal reference
161.	A4-1-1	Planning session reports: end of year data	Planning Section shared drive	University Archives	CY+4		
162.	A4-1-1; A8-3-1; A8-3-4	Planning session reports: SHEFC return extracts	Planning Section shared drive	Destroy	CY+4		
163.	A4-1-6	Full planning session report anonymised for college and school use	Planning Section website	Destroy	CY+4		
164.	A4-1-4	Other planning session reports	Planning Section shared drive	Destroy	CY+2		
165.	A4-1-1	Summary of current student population at various dates through year (access restricted to College Support Team)	Planning Section website	Destroy	CY+4		
166.	A4-1-3	Other management information (student, staff, financial, research, applicants, estates and buildings, college statistics etc)		University Archives			Case-by-case decision, but much of it will have archival value
167.	A4-1-4	Responses to management information queries	Planning Section files	Review	CY+1		Some may have longer value
<b>Compiled by:</b>				<b>Date:</b>			
<b>Approved by University Records Manager:</b>							
<b>Name:</b>		<b>Signature:</b>		<b>Date:</b>			
<b>Approved by head(s) of unit(s):</b>							
<b>Name:</b>		<b>Signature:</b>		<b>Date:</b>			
<b>Version no:</b>	6	<b>Details:</b>	Final version for submission to JISC				

