				v1.0 May 2018
		Alumni Relations Retention Schedule		
	Description of Records	**Retention Trigger and Retention Period**	**Disposal Action**	**Rationale for Retention Period and Disposal Action**	**Records Owner**
1	**Alumni Relations Strategy and Policy Development**				
1.1	Records documenting the development and establishment of the institution's alumni relations strategy and policy: key records	Superseded + 5 years	Review	Potential historic/research value	DARO
1.2	Records documenting the development and establishment of the institution's alumni relations strategy and policy: working papers	Issue of strategy and policy + 3 years	Destroy	Potential historic/research value	DARO
2	**Alumni Relations Procedure Development**				
2.1	Master copies of procedures relating to alumni relations	Superseded + 3 years	Review	Potential historic/research value	DARO
2.2	Records documenting the development of the institution's procedures relating to alumni relations	Issue of procedures + 1 year	Destroy	Potential historic/research value	DARO
3	**Alumni Records Administration**				
3.1	Records containing personal data on individual alumni	While current (or likely to be current)	Retain	Reviewed regularly to ensure currency	DARO
3.2	Summary (anonymised) statistical records of alumni	Soft copy retained indefinitely	Review	Potential historic/research value soft copy retained	DARO
4	**Alumni Communications Management**				
4.1	Records documenting the design, planning and production of official alumni communications	Issue of communication + 1 year	Destroy	Soft copy of summary report retained indefinitely	DARO
4.2	Alumni Publications	Permanently retained	Archive	Examples include the magazine, The Graduate	University Archive
4.3	Alumni communications	Indefinitely retained	Review	Soft copy retained and limited stocks of paper publications retained	DARO
4.4	Records documenting enquiries from alumni and the responses provided	Scan original letter and record to database and destroy original. Record email or response on database		Soft copy retained	DARO
4.5	Records documenting unsolicited feedback from alumni, the internal handling of this feedback and the responses provided	Scan original letter and record to database and destroy original. Record email or response on database		Soft copy retained	DARO

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4.6	Records documenting the design and conduct of alumni surveys	Completion of survey + 3 years	Destroy	Soft copy retained	DARO
4.7	Results of alumni surveys: individual responses	Completion of analysis of survey responses	Destroy	Soft copy retained	DARO
4.8	Results of alumni surveys: summaries and analyses of responses	Permanently retain	Destroy	Soft copy retained	DARO
4.9	Records documenting the handling of complaints from alumni	Scan original letter and record to database and destroy original. Record email on database.		Soft copy retained	DARO
5	**Alumni Events Management**				
5.1	Records documenting the planning and impact/results of institutional events for alumni	Completion of event + 3 years	Review	Depends on the significance of the event	DARO
5.2	Records documenting the organisation and administration of institutional events for alumni	Completion of event + 1 year	Review	Depends on the significance of the event	DARO
6	**Alumni Support**				
6.1	Records documenting 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	Destroy	Long term retention is not required	DARO
6.2	Records documenting the administration of financial and other support to alumni organisations	Current financial year + 7 years	Destroy	Long term retention is not required	DARO
6.3	Records documenting internal requests for contact details for alumni, action taken and the responses provided	Last action on request + 1 year	Destroy	Requests deleted after 1 year, reports created summarising all requests. Reports retained indefinitely.	DARO
7	**Scholarships and Awards**				
7.1	Financial information relating to Scholarships and Awards	Soft copy retained indefinitely	Destroy (Hard copy)	Hard copy not retained	DARO

		Fundraising Retention Schedule			
	Description of Records	**Retention Trigger and Retention Period**	**Disposal Action**	**Rationale for Retention Period and Disposal Action**	**Records Owner**
1	**Fundraising Strategy and Policy Development**				
1.1	Records documenting the development and establishment of the institution's fundraising strategy and policy: key records	Superseded and retain indefinitely	Review	Potential reference value (Soft copy retained)	DARO
1.2	Records documenting the development and establishment of the institution's fundraising strategy and policy: working papers	Issue of strategy and policy + 2 years	Destroy	Potential reference value (Soft copy retained)	DARO
1.3	Records documenting the development and establishment of the institution's fundraising strategy and policy: The Queen's University of Belfast Foundation	Hard copy retained indefinitely	Destroy	Potential reference value (Soft copy retained)	DARO
2	**Fundraising Procedure Development**				
2.1	Master copies of procedures relating to fundraising	Superseded + 1 year	Review	Potential reference value (Soft copy retained)	DARO
2.2	Records documenting the development of the institution's procedures relating to fundraising	Issue of procedures + 1 year	Destroy	Potential reference value (Soft copy retained)	DARO
3	**Fundraising Campaign Management**				
3.1	Records documenting the design, conduct of fundraising campaigns	Last action on campaign + 5 years	Retain/Review	Will hold value for the management of future campaigns	DARO
3.2	Records documenting the summary results of fundraising campaigns	Hard copy retained indefinitely	Retain/Review	Potential reference value (Soft copy retained)	DARO
3.3	Records containing details of individual responses to fundraising campaigns	Completion of data analysis	Destroy	Destroy after data analysis is complete	DARO

	Fundraising Retention Schedule			
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4	**Donations Management**				
4.1	Records documenting the handling of enquiries about making donations to the institution	Indefinitely an action is recorded on database	Destroy (Hardcopy)	Softcopy held on database indefinitely	DARO
4.2	Records documenting donations to the institution	Record retained indefinitely	Retain/Review	Softcopy held on database indefinitely	DARO
5	**Prospect Research; Research**				
5.1	Profiles, bios and nomination forms	10 years	Destroy	Out of date information will be removed and destroyed	DARO
5.2	Database fields containing Press coverage	10 years	Retain/Review	Potential reference value (Soft copy retained)	DARO
5.3	Database fields containing Notes; 'Prospect Research Potential'	10 years	Destroy	Out of date information will be removed and destroyed	DARO
6	**Prospect Research; Database Records**				
6.1	Personal information such as employment details	Record retained indefinitely	Retain/Review	Potential reference value (Soft copy retained)	DARO
6.2	Database attributes including screening flags	Superseded + 5 years	Retain/Review	Out of date information will be removed and destroyed	DARO
6.3	Database fields containing Ratings	Superseded + 5 years	Retain/Review	Out of date information will be removed and destroyed	DARO
6.4	Database fields containing Queen's Honorary Graduates flags	Record retained indefinitely	Retain	Potential reference value (Soft copy retained)	DARO
6.5	Database fields containing Relationships	Record retained indefinitely	Retain	Potential reference value (Soft copy retained)	DARO