

						v4.0 July 2025
	FINANCE DIRECTORATE RECORDS RETENTION SCHEDULE					
	Description of Record	Retention Trigger and Retention Period	Disposal Action	LEGISLATION	Rationale for Retention Period and Disposal Action	Finance role to advise on records retention
21.1	Records documenting the development and establishment of the institution's procurement strategy: key records	Superseded + 5 years	Review	N/A	JISC Recommendation	Head of Procurement
22.2	Records documenting the development and establishment of the institution's procurement strategy: working papers	Issue of strategy + 1 year	Destroy	N/A	JISC Recommendation	Head of Procurement
22.1	Records documenting the development and establishment of the institution's procurement policies: key records	Superseded + 5 years	Review	N/A	JISC Recommendation	Head of Procurement
22.2	Records documenting the development and establishment of the institution's procurement policies: working papers	Issue of policy + 1 year	Destroy	N/A	JISC Recommendation	Head of Procurement
23.1	Master copies of procedures relating to the management of procurement	Superseded + 3 years	Review	N/A	JISC Recommendation	Head of Procurement
23.2	Records documenting the development of the institution's procedures relating to the management of procurement	Issue of procedures + 10 years	Review	N/A	JISC Recommendation	Head of Procurement
24.1	Records documenting the process of inviting and evaluating pre-qualification submissions from prospective suppliers	Termination of contract plus 12 years	Destroy	Procurement Act 2023 S 98	JISC Recommendation	Head of Procurement
24.2	Records documenting Invitations to Tender and tender evaluation criteria	Termination of contract plus 12 years	Destroy	Limitation Act 1980 Procurement Act 2023 S 98	Limitation Act 1980 c. 58 s 5	Head of Procurement
24.3	Records documenting the issue of Invitations to Tender and handling of incoming tenders	Termination of contract plus 12 years	Destroy	Procurement Act 2023 S 98	JISC Recommendation	Head of Procurement
24.4	Records documenting the evaluation of tenders, the conduct of negotiations with tenderers and the notification of the results of the tender evaluation process: rejected tenders	Termination of contract plus 12 years	Destroy	Procurement Act 2023 S 98	JISC Recommendation	Head of Procurement
24.5	Records documenting the evaluation of tenders, the conduct of negotiations with tenderers and the notification of the results of the tender evaluation process: accepted tenders	Termination of contract plus 12 years	Destroy	Limitation Act 1980 Procurement Act 2023 S 98	Limitation Act 1980 c. 58 s 5	Head of Procurement
24.6	Contract award notices sent to the official Government advertising system	Termination of contract plus 12 years	Destroy	Limitation Act 1980 Procurement Act 2023 S 98	Limitation Act 1980 c. 58 s 5	Head of Procurement
25.1	Records documenting purchasing authorisation limits	Superseded + 10 years	Destroy	N/A	JISC Recommendation	Head of Procurement and Assistant Director of Finance (Financial Services)
25.2	Records documenting internal authorisation for procurement	Current financial year + 14 years	Destroy	N/A	JISC Recommendation	Head of Procurement
25.3	Purchase Orders and quotation documentation	Current financial year + 14 years	Destroy	Limitation Act 1980 VAT Notice 700	Limitation Act 1980 c. 58 s 5 VAT Notice 700 - HMRC 700/21 para. 5.2	Head of Procurement
25.4	Goods Received Notes/Goods Inwards Notes	Current financial year + 14 years	Destroy	Limitation Act 1980 VAT Notice 700/21	Limitation Act 1980 c. 58 s 5 Vat Notice 700/21: keeping VAT records - HMRC 700/21 para. 5.2	Head of Procurement
25.5	Purchase Card Supporting Documentation	Current financial year + 14 years	Destroy	Limitation Act 1980 VAT Notice 700/21	Limitation Act 1980 c. 58 s 5 Vat Notice 700/21: keeping VAT records - HMRC 700/21 para. 5.2	Head of Procurement
26.1	Records documenting variations to contracts (e.g. revisions, extensions)	Termination of contract + 6 years	Destroy	Limitation Act 1980	Limitation Act 1980 c. 58 s 5	Head of Procurement
26.2	Records documenting the monitoring of supplier performance and action taken regarding under-performance	Termination of contract + 6 years	Destroy	Limitation Act 1980	Limitation Act 1980 c. 58 s 5	Head of Procurement