

Education Strategy Development

	Description of Records	Retention Trigger and Period	Disposal Action	Rationale for Retention Period and Disposal Action	Records Owner
1 Education Strategy Development					
1.1	Records documenting the development and establishment of the institution's education strategy.	Superseded + 10 years	Review for archival value/Delete	JISC Recommendation	Head of Educational and Skills Development
1.2	Records containing data on, and analyses of, performance against the plans for the implementation of the institution's education strategy.	Current academic year + 1 year	Delete	JISC Recommendation	Head of Educational and Skills Development
1.3	Records containing reports of performance against the plans for the implementation of the institution's education strategy	Current academic year + 1 year	Delete	JISC Recommendation	Head of Educational and Skills Development
2 Committees and Working Groups					
2.1	Records relating Committees including Working Groups such as constitutions, terms of reference, rules and procedures and any changes to these	End of life of Committee/Working Group + 6 years	Review	Potential historic/research value	Committee Secretary
2.2	Research papers and other papers compiled for Committees and Groups	End of academic year + 6 years	Review	Data Protection Act 1998; Freedom of Information Act 2000; Limitation (NI) Order 1989	Committee Secretary
Educational Development					
1 Staff Training and Development					
1.1	Records relating to courses/events including course description, course materials	Superseded + 1 year	Delete	JISC Recommendation	CED
1.2	Attendance Sheets	Completion of training + 1 year	Delete	JISC Recommendation	CED
2 Developing Learning Resources					
2.1	Publications (Leaflets, booklets)	Superseded + 1 year	Delete	JISC Recommendation	CED

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3 Feedback					
3.1	Records documenting routine solicited feedback on courses/events: individual feedback, forms and questionnaires	Completion of analysis of feedback	Delete	JISC Recommendation	CED
3.2	Records containing (anonymised) summaries and analyses of routine solicited feedback on courses/events	End of academic year + 6 years	Review	JISC Recommendation	CED
4 Managing learning and teaching related Projects					
4.1	Project application and grant	Successful proposals: Completion of project + 6 years Unsuccessful proposals: Abandonment of plans + 1 years	Delete/ Retain Anonymised	JISC Recommendation	CED
4.2	Records documenting the design and planning of projects which are undertaken	Completion of project + 6 years or longer if required by funder / sponsor / regulatory body	Delete/ Retain Anonymised	JISC Recommendation	CED
4.3	Formal reports to sponsors	Current year + 5 years	Archive	JISC Recommendation	CED
5 Science Shop Projects					
5.1	Records relating to student projects held in spreadsheets, databases	Graduation +2 years	Delete	JISC Recommendation	Science Shop
5.2	Records relating to community groups	Duration of active projects + 3 years	Review	JISC Recommendation	Science Shop
6 Teaching Awards (Internal/External)					
6.1	Documents relating to scheme (include membership/guidance notes)	Superseded + 1 year	Delete	Business Process	CED
6.2	Teaching Awards submissions	Successful submissions: retain Unsuccessful submissions Decision + 6 months	Retain/Delete	Business Process	CED
6.3	Panel scores and decisions (shortlisting and presentations)	End of academic year + 1 year	Delete	Business Process	CED
6.4	Annual review of scheme (notes)	Superseded + 1 year	Delete	Business Process	CED
Widening Participation					
1 School Events					
1.1	Schools Contact Details	End of academic year	Review to ensure kept up-to-date	Business process	Widening Participation

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1.2	Records relating to the organisation of Widening Participation events	Completion of event + 1 year	Review and retain only information to inform planning for next year events	Business process	Widening Participation
2 Programmes (Senior and Junior/Boys Sports)					
2.1	Academy Application Forms	Successful - Retain until end of student relationship + 6 years Unsuccessful - Retain until completion of admissions process + 1 year	Delete/ Retain Anonymised	JISC Recommendation	Widening Participation
2.2	Academy Tutor Expression of Interest Forms	Hold for 1 year	Review and update	Business process	Widening Participation
2.3	Academy Tutor Agreements	Hold for 1 year	Review and renew/delete	Business process	Widening Participation
2.4	Academy Tutor Reports	Hold for 1 year	Delete/ Retain Anonymised	Business process	Widening Participation
2.5	Academy Parental Consent Forms	Until completion of programme	Delete/Destroy	see retention period recorded in the 'Safeguarding Children and Vulnerable Adults Policy and Guidance Privacy Note'	Widening Participation
3 Pathway Opportunity Programme					
3.1	Pathway Opportunity Programme Application Forms	Successful - Retain until end of student relationship + 6 years Unsuccessful - Retain until completion of admissions process + 1 year	Delete/ Retain Anonymised	Business process	Widening Participation
4 Care Leavers					
4.1	Care leavers bursary applications	Duration of programme + 2 years	Delete/Destroy	Business process	Widening Participation
5 Vetting Information					
5.1	PIN notification and ID validation form (form 1)	2 years after termination of work	Destroy	Business process	Widening Participation
5.2	Self declaration form (form 3)	Completed annually	Destroy annually	see retention period recorded in the 'Safeguarding Children and Vulnerable Adults Policy and Guidance Privacy Note'	Widening Participation
5.3	Senior Academy Code of Practice and Good Conduct Forms	Completed annually	Destroy annually	see retention period recorded in the 'Safeguarding Children and Vulnerable Adults Policy and Guidance Privacy Note'	Widening Participation

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6 WP Bursaries					
6.1	Details of WP Scholarships	End of current financial year + 6 years (round up to 7 years)	Delete	Limitation (NI) Order, 1989	Widening Participation
7 Learning Resources					
7.1	Materials both online and paper based (including copyright agreements)	Superseded + 1 year	Delete	JISC Recommendation	Widening Participation
7.2	Publications (Leaflets, booklets)	Superseded + 1 year	Delete	JISC Recommendation	Widening Participation
8 Feedback					
8.1	Records documenting routine solicited feedback on courses/events: individual feedback, forms and questionnaires	Completion of analysis of feedback	Delete	JISC Recommendation, not required once collation is complete	Widening Participation
8.2	Records containing (anonymised) summaries and analyses of routine solicited feedback on courses/events	End of academic year + 6 years	Review	JISC Recommendation	Widening Participation
Learning Development and Careers					
1 University Surveys					
1.1	Completed DLHE (Destination of Leavers from Higher Education) online surveys	End of current academic year + 6 years	Delete	Sector standard	Careers, Employability and Skills
1.2	DLHE Reports	n/a	Retain	Sector standard	Careers, Employability and Skills
1.3	NSS (National Student Survey) online surveys	End of current academic year + 6 years	Delete	Sector standard	Careers, Employability and Skills
1.4	NSS Reports	n/a	Retain	Sector standard	Careers, Employability and Skills
1.5	FYE/SYE (First Year Experience and Second Year Experience) online surveys	End of current academic year + 6 years	Delete	Sector standard	Careers, Employability and Skills
1.6	FYE/SYE Reports	n/a	Retain	Business Process	Careers, Employability and Skills
2 Courses/Events for students					
2.1	Records relating to the operation of courses/events include contact information, confirmations, notes of needs	End of academic year in which the event/course took place + 1 year	Delete	JISC recommendation	Service
2.2	Course materials content, presentation topics	End of academic year in which the event/course took place + 2 years	Review /delete	Sector standard	Service
2.3	Summaries of events on QUB website/MyFuture	Review annually for currency	Delele/Retain if still current	Business Process	Service

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2.4	Marketing material promoting the Service	Superseded + 1 year	Delete	JISC recommendation	Service
3 Learning Resources					
3.1	Resources/Guides to support student development	Superseded + 1 year	Delete / update	JISC Recommendation	Service
3.2	Publications (Leaflets, booklets)	Superseded + 1 year	Delete / update	JISC Recommendation	Service
4 Feedback					
4.1	Records documenting routine solicited feedback on courses/events: individual feedback, forms and questionnaires	Completion of analysis of feedback	Delete	JISC Recommendation, not required once collation is complete	Service
4.2	Records containing (anonymised) summaries and analyses of routine solicited feedback on courses/events	End of academic year + 6 years	Review	JISC Recommendation	Service
5 Assessment and Award of Qualifications					
5.1	DegreePlus student records including activity receipt, approvals that are held in QGIS	All such accreditations are uploaded into the QGIS student record	Data held outside of Qgis (eg Excel, local databases) should be deleted after use	JISC Recommendation	Student Registry
5.2	DegreePlus Route B application forms and evidence e.g. scanned certificates + marker records	Graduation + 2 years	Delete	JISC recommendation	Careers, Employability and Skills
5.3	DegreePlus Route A pass lists including emails from DegreePlus providers	Graduation + 2 years	Delete	JISC recommendation	Careers, Employability and Skills
6 Managing Exchange and Study Abroad (including Erasmus)					
6.1	Erasmus student files (outgoing), includes student mobility agreements, learning agreements, attendance confirmation, report forms and questionnaires	Termination of student relationship + 6 years	Delete	Limitation (NI) Order 1989; Data Protection Act 2018; European Commission/UK Erasmus National Agency guidelines	Careers, Employability and Skills
6.2	Erasmus student files (incoming), includes application forms for incoming Erasmus students	Termination of student relationship + 6 years	Delete	JISC recommendation	Careers, Employability and Skills

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6.3	Lists of outgoing and incoming students on Erasmus and Exchange programmes - includes names and contact details on database	Termination of student relationship + 6 years	Partial deletion - limited information retained for partnership reviews and alumni follow-up	Limitation (NI) Order 1989; Data Protection Act 2018; European Commission/UK Erasmus National Agency guidelines	Careers, Employability and Skills
6.4	Agreements with partner universities	End of agreement + 12 years	Destroy/Delete	European Commission/UK Erasmus National Agency guidelines; JISC recommendation	Careers, Employability and Skills
6.5	Exchange programmes files (outgoing) - University wide, includes students files containing records on student mobility	Termination of student relationship + 6 years	Delete	Limitation (NI) Order 1989; Data Protection Act 2018;	Careers, Employability and Skills
6.6	Study Abroad (incoming), includes student files, forms, transcripts	Termination of student relationship + 6 years	Delete	JISC recommendation	Careers, Employability and Skills
6.7	Programmes run by the British Council - student files, forms, transcripts	Termination of student relationship + 6 years	Partial deletion - limited information retained for alumni follow-up	Limitation (NI) Order 1989; Data Protection Act 2018	Careers, Employability and Skills
6.8	Erasmus staff visit files, includes workplan, contract, expenses claim	End of academic year + 6 years	Destroy/Delete	Limitation (NI) Order 1989; Data Protection Act 2018; European Commission/UK Erasmus National Agency guidelines	Careers, Employability and Skills
6.9	List of staff on Erasmus visits - includes names and grant amounts on spreadsheet	End of placement + 6 years	Partial deletion - limited information retained for partnership reviews and alumni follow-up	Limitation (NI) Order 1989; Data Protection Act 2018	Careers, Employability and Skills
6.10	International Travel Scholarship student files and spreadsheets - includes applications, reports	Termination of student relationship + 6 years	Delete	Limitation (NI) Order 1989; Data Protection Act 2018	Careers, Employability and Skills
7	Managing extra-curricular Programmes				
7.1	Documents relating to the administration/delivery of programmes	Superseded (programme end date) + 1 year	Retain/Delete	Business process	Careers, Employability and Skills
7.2	Records relating to student details, engagement and outcomes in MyFuture	Graduation + 2 years unless confirmed to QSIS (Degree Plus)	Delete	Business process as support offered to Graduates up to 2 years post graduation	Careers, Employability and Skills
7.3	Paper downloaded Application forms for programmes	End of assessment	Delete	Business Process	Careers, Employability and Skills
7.4	Annual reports on programmes	n/a	Retain	Business process	Careers, Employability and Skills
7.5	MyFuture student data	Graduation + 2 years	Delete	Business process	Careers, Employability and Skills

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8	Careers guidance and coaching for under/post graduates				
8.1	Careers Consultation System Notes - case notes for current students held in MyFuture	Graduation + 2 years	Delete	Business process as support offered to Graduates up to 2 years post graduation	Careers, Employability and Skills
9	Employer Engagement				
9.1	Contact details of employers in MyFuture	End of current year + 3 years	Review to ensure currency	Business Process	Careers, Employability and Skills
10	Managing extra-curricular Internships				
10.1	Records relating to student placements held in spreadsheets, databases	Completion of programme	Record details on the student's QSIS record and delete all other copies of data	Details of the programmes are recorded on the student's QSIS record	Careers, Employability and Skills
10.2	Application forms for internships	End of academic year + 1 year	Delete		Careers, Employability and Skills
10.3	Annual Reports including placement reports	n/a	Retain	All reports produced are held by the Careers service	Careers, Employability and Skills
11	Learning Development guidance				
11.1	Consultation Notes - case notes for current students (paper and electronic)	Graduation + 2 years	Delete	JISC Recommendation	Learning Development Service
12	On Campus Jobs (student employment within Queen's University Belfast)				
12.1	Records relating to Right to Work checks including students passport details and visa permit cards	End of academic year when employment was terminated + 2 years	Delete	Business Process	OCJ
12.2	Employee Statements	End of academic year when employment was terminated + 3 years	Delete	Business Process	OCJ
12.3	Starter Forms and Additional Hours Forms	End of academic year when employment was terminated + 3 years	Delete	Business Process	OCJ
12.4	Records relating to interviews including shortlisting form, list of applicants, individual rating forms, panel ranking form, convenors summary	End of current academic year + 2 years	Delete	Business Process	OCJ
12.5	Salaries Reports giving details of students pay and hours worked	End of academic year when employment was terminated + 2 years	Delete	Business Process	OCJ

	Description of Records	Retention Trigger and Period	Disposal Action	Rationale for Retention Period and Disposal Action	Records Owner
12.7	Records relating to the administration of Oncampus Jobs on Queen's Online includes student names, student numbers, CVs	End of current academic year + 2 years	Delete	Business Process	OCJ
12.8	Student Timesheets	End of current academic year + 2 years		Business Process	OCJ
13 Development Weeks					
13.1	Records relating to the administration of Development Weeks activity includes student names, student numbers	End of evaluation of engagement + 1 year	Delete	Business Process	Careers, Employability and Skills
Graduate School					
1 University Postgraduate Surveys					
1.1	PTES (Postgraduate Taught Experience Survey) - completed online surveys	End of current academic year + 6 years	Delete	Sector standard	Graduate School
1.2	PRES (Postgraduate Research Experience Survey) - completed online surveys	End of current academic year + 6 years	Delete	Sector standard	Graduate School
1.3	PTES/PRES Reports	n/a	Retain	Business process	Graduate School
2 Courses and Events					
2.1	Records relating to courses including course description, course materials, attendance lists	Superseded + 1 year	Delete	JISC Recommendation	Graduate School
2.2	Records relating to events including event description, event materials, attendance lists	Completion of training/event + 1 year	Delete	JISC Recommendation	Graduate School
2.3	Summaries of events a on QUB website	End of academic year	Review / Delete where out of date	Business Process	Graduate School
2.4	Marketing material promoting the Service/event	End of academic year	Review / Delete where out of date	Business Process	Graduate School
3 Learning Resources					
3.1	Materials relating to MOOCs and Distance Learning (including learning materials, copyright agreements)	Completion of training/event + 1 year	Delete	JISC Recommendation	Graduate School
3.2	Publications (Leaflets, booklets)	Superseded + 1 year	Delete	JISC Recommendation	Graduate School

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4 Feedback					
4.1	Records documenting routine solicited feedback on courses/events: individual feedback, forms and questionnaires	Completion of analysis of feedback	Delete	JISC Recommendation, not required once collation is complete	Graduate School
4.2	Records containing (anonymised) summaries and analyses of routine solicited feedback on courses/events	End of academic year + 6 years	Review	JISC Recommendation	Graduate School
4.3	Module/course evaluation documents related to accredited programme	End of academic year + 1 year	Delete	Business Process	Graduate School
5 Assessment and Award of Qualifications					
5.1	ResearcherPlus/Graduate Plus student records including activity receipt, approvals that are held in QSIS	Held in Qsis		All such accreditations are uploaded into the QSIS student record	Student Registry
5.2	Records relating to the Chartered Management Institute including student assignments, marking sheets, monitoring of student progress	Student receipt of CMI certificate or withdrawal from programme	Delete	CMI requirement	Graduate School
5.3	Records relating to the Institute of Leadership and Management	to be moved to Clinton Leadership Institute	n/a	No longer being delivered by GS	Graduate School
5.4	Records relating to the Innovation Academy / QUB accredited courses	Student receipt of Innovation Academy Certificate + 1 year	Delete	Business Process (QUB QA)	Graduate School
5.5	Student tracking sheets (e.g. ILM, CMI, Innovation Academy)	Graduation + 2 years for all non-QSIS records	Delete all non-QSIS records	Business Process	Graduate School
5.6	Student contact details	Completion of Graduate School course	Delete all non-QSIS records	Business Process	Graduate School
6 Training/Development Programmes					
6.1	Documents relating to the administration/delivery of these programmes	Supersede + 1 year	Retain/Delete	Business Process	Graduate School
6.2	Completed application forms for programmes	End of current academic year + 1 year	Delete	Business Process	Graduate School
6.3	Annual reports	n/a	Retain	All reports produced are retained by the department	Graduate School

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7	Careers guidance and coaching				
7.1	Careers Consultation System Notes - case notes for current students (paper and electronic) held in MyFuture	Held on MyFuture	Delete	Business process as support offered to Graduates up to 2 years post graduation	CES
8	Postgraduate Awards				
8.1	Records relating to the administration of scholarships and awards	Retention schedule determined by specific funding body's conditions - see below	Delete	Funding Body requirement	Graduate School
8.2	Student files (paperbased and/or electronic) may contain application, supporting documents to evidence eligibility for funding/payment, contract and IPR agreement, correspondence relating to studentship payments	Retention schedule determined by specific funding body's conditions - see below	Delete	Funding Body requirement	Graduate School
8.3	Student Payroll Administration eg PhD Stipends	Core studentship record on iTrent. Paper based records and electronic records retained in line with specific funding body's conditions (minimum termination of award + 7 years)	Destroy/Delete paper and electronic records	Funding Body requirement	Graduate School
8.4	Records documenting the administration of applications unsuccessful for funding	Retain to end of academic year to which application relates	Delete		Graduate School
8.5	Records relating to partnership agreement between University and Funding body and grant award letters	Retention schedule determined by specific funding body's conditions - see below	Delete	Funding Body requirement	Graduate School
8.6	Records relating to Awards Management and monitoring to ensure compliance with Funding Body terms eg Annual Reports to Funders	n/a	Retain	Business Process	Graduate School
8.7	Records documenting internal requests for studentship information and report action taken and the responses provided	end of academic year + 1 year	Delete	Business Process	Graduate School

Funding Bodies					
	Description of Records	Retention Trigger and Period	Disposal Action	Rationale for Retention Period and Disposal Action	Records Owner
1.1	General Bursaries - Bursaries Administration Scholarships and Fellowships Administration	Current financial/academic year + 6 years; Minimum Default unless specified	Recommendation of each Funder	Limitation (NI) Order 1989	
1.2	Research Council Funding including EPSRC DTG and AHRC NBDTP	The Research Organisation must retain all accounting information relating to the Grant for the current financial year plus the subsequent six years after the submission date of the final expenditure statement; 14 years	Recommendation of each Funder	TGC 3 Responsibilities of the Research Organisation; RCUK Training Grant Guide	
1.3	NINE DTP	Collaboration Agreement is due to expire on the 30th of September 2027 and clause 3.6 states: The Universities must for a period of seven (7) years from the end date of this Agreement retain all accounts referred to in this Clause 3.5.	Recommendation of Funder		
1.4	DfE	Current financial year + subsequent 6 years after the submission date of the DfE Annual Return	Recommendation of Funder		
1.5	Special Research Scholarships (SRS)			PG Awards facilitate the processing of studentship payment funded by various internal and external funders. PG Awards is not responsible for the management of SRS funds. Clarification to be sought from Finance regarding the storage and retention period for records documenting SRS awards management	
1.6	IPR			Clarification to be sought from Research & Enterprise Directorate regarding the processing, storage, and retention period for IPR forms (to be held indefinitely). Currently held by PG Awards in student file on behalf of Research & Enterprise	