Heritage and Information Governance
Records Retention Schedule for Corporate Services

Corporate service means a service provided primarily for the institution's staff but which may be provided (or available to) students, the public and external organisations. Corporate services may be provided directly by the institution, through partnership arrangements with other institutions or by external organisations under contract.

This retention schedule is based on the recommendations made by the Joint Information Systems Committee. The letter indicates the final disposition of each type of record, and applies to original records. Where copies of originals are kept locally, these can be destroyed when these are no longer required:

A = 1 copy to be transferred to the University Archive. See Retention Schedule Guidelines for further details.
D = Destroyed.

The number following the letter code indicates the period (in years) after which records may be destroyed, and is the minimum retention period required by best practice or legislation. It assumes a new file is opened at the start of each academic, calendar or financial year, and is **always** calculated from the date of the last record in the file.

Folder Structure	**Examples of Types of Record**	**Retention Period**	**Legislative Authority**
CorporateServices/Strategy Activities include: • identifying requirements for new/revised strategy • undertaking research • developing strategy proposals • consulting on strategy proposals • reviewing and revising strategy proposals in the light of comments received • drafting strategy documents • consulting on strategy documents • reviewing draft strategy documents in the light of comments received • producing final strategy documents • submitting final strategy documents for formal endorsement • formally endorsing strategy documents • disseminating strategy documents • reviewing strategy	Key records documenting the development and establishment of the institution's commercial services strategy. Working papers documenting development and establishment of the institution's commercial services strategy	A: Superseded + 3 years Copy to the University Archive after approval for permanent retention. D: Issue of strategy + 1 year	

Records Retention Schedule for Corporate Services (2)

CORPORATESERVICES/POLICY • identifying requirements for new/revised policy • undertaking research • developing policy proposals • consulting on policy proposals • reviewing and revising policy proposals in the light of comments received • drafting policy documents • consulting on policy documents • reviewing draft policy documents in the light of comments received • producing final policy documents • submitting final policy documents for formal approval • formally approving policy documents • disseminating policy documents • reviewing policy	Key records documenting the development and establishment of the institution's tuition fees policies. Working papers documenting development and establishment of the institution's tuition fees policies.	A: Superseded + 3 years Copy to the University Archive after approval for permanent retention. D: Issue of policy + 1 year	
CORPORATESERVICES/PROCEDURES • identifying needs for new/revised procedure • undertaking research • analysing work processes • drafting procedure documents • consulting on procedure documents • reviewing draft procedure documents in the light of comments received • trialling procedure • refining procedure as a result of trials • submitting final procedure documents for formal approval • formally approving procedure documents • disseminating procedure documents • reviewing procedure.	Master copies of procedures relating to tuition fees. Development of the institution's procedures relating to tuition fees.	A: Superseded + 3 years Copy to the University Archive after approval for permanent retention. D: Issue of procedures + 1 year	

Records Retention Schedule for Corporate Services (3)

CORPORATESERVICES/OPERATIONS Some activities are common to many types of corporate services (e.g. handling enquiries; scheduling work). Other activities are specific to particular types of services. The institution should identify and define the activities associated with each service that it provides. This single activity of 'Operations Management' may be replaced by a number of specific activities, depending on the complexity of the service being provided.	TO BE DEFINED BY THE INSTITUTION	TO BE DEFINED BY THE INSTITUTION	
CORPORATESERVICES/CUSTOMERS Activities include: • handling customer complaints • conducting customer surveys.	Records documenting enquiries about the service and the responses provided. Records documenting the handling of complaints from customers of the service. Records documenting unsolicited customer feedback on the service and the responses provided. Records documenting the design of service customer surveys and the (anonymised, if necessary) analysis of responses. Individual responses to service customer surveys.	D: Last action on enquiry + 1 year D: Last action on complaint + 3 years D: Last action on feedback + 3 years D: Last action on survey + 3 years D: Completion of analysis of responses	

For providing a service primarily to support students, use the framework provided in the STUDENT SERVICES section.
For providing a commercial service, use the framework provided in the COMMERCIAL SERVICES section.

Note 1
This is a generic business classification scheme for the function of providing a corporate service It is a framework which can be customised to produce a specific business classification scheme for any type of corporate service which the institution provides.

Corporate services provided by HEIs include: archives services; catering services; computing services; graphic design services; leisure services; library and information services; mail services; museum services; photographic services; reception services; records management services; reprographic services; security services; telephone services.

Identifying and defining all the activities involved in delivering all the possible services that an institution could provide is outside the scope of this Business Classification Scheme.

Note 2
This function is intended to cover only the substantive (i.e. 'core business') aspects of providing a corporate service. A business unit which provides a corporate service will also undertake functions which appear elsewhere in this business classification scheme (e.g. Finance Management).