

**HERITAGE AND INFORMATION GOVERNANCE**  
**Records Retention Schedule for Students' Union Relations**

The covers the managing the institution's relationship with its students' union, to fulfil its responsibilities under the Education Act 1994 (1994 c. 30).

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
<p><b>STUDENTSUNION/STRATEGY</b></p> <ul style="list-style-type: none"> <li>• identifying requirements for new/revised strategy</li> <li>• undertaking research</li> <li>• developing strategy proposals</li> <li>• consulting on strategy proposals</li> <li>• reviewing and revising strategy proposals in the light of comments received</li> <li>• drafting strategy documents</li> <li>• consulting on strategy documents</li> <li>• reviewing draft strategy documents in the light of comments received</li> <li>• producing final strategy documents</li> <li>• submitting final strategy documents for formal endorsement</li> <li>• formally endorsing strategy documents</li> <li>• disseminating strategy documents</li> <li>• reviewing strategy.</li> </ul>	<p>Key records documenting the development and establishment of the institution's students' union relations strategy.</p> <p>Working papers documenting development and establishment of the institution's students' union relations strategy.</p>	<p>A: Superseded + 10 years Copy to the University Archive after approval for permanent retention.</p> <p>D: Issue of strategy + 1 year</p>	

## Records Retention Schedule for Students' Union Relations (2)

<p><b>STUDENTS UNION/POLICY</b></p> <ul style="list-style-type: none"> <li>• identifying requirements for new/revise policy</li> <li>• undertaking research</li> <li>• developing policy proposals</li> <li>• consulting on policy proposals</li> <li>• reviewing and revising policy proposals in the light of comments received</li> <li>• drafting policy documents</li> <li>• consulting on policy documents</li> <li>• reviewing draft policy documents in the light of comments received</li> <li>• producing final policy documents</li> <li>• submitting final policy documents for formal approval</li> <li>• formally approving policy documents</li> <li>• disseminating policy documents</li> <li>• reviewing policy</li> </ul>	<p>Key records documenting the development and establishment of the institution's students' union relations policies</p> <p>Working papers documenting development and establishment of the institution's students' union relations policies</p> <p>Development and establishment of the institution's code of practice on the oversight of the operations and finances of its students' union, as required by Section 22(3) of the Education Act 1994</p> <p>Code of Practice required by Section 22(3) of the Education Act 1994</p>	<p>A: Superseded + 5 years Copy to the University Archive after approval for permanent retention.</p> <p>D: Issue of policy + 1 year</p> <p>Issue of revised Code of Practice + 1 year 1994 c.30 does not prescribe a retention period.</p> <p>Superseded + 10 years</p>	
<p><b>STUDENTS UNION/PROCEDURES</b></p> <ul style="list-style-type: none"> <li>• identifying needs for new/revise procedure</li> <li>• undertaking research</li> <li>• analysing work processes</li> <li>• drafting procedure documents</li> <li>• consulting on procedure documents</li> <li>• reviewing draft procedure documents in the light of comments received</li> <li>• trialling procedure</li> <li>• refining procedure as a result of trials</li> <li>• submitting final procedure documents for formal approval</li> <li>• formally approving procedure documents</li> <li>• disseminating procedure documents</li> <li>• reviewing procedure.</li> </ul>	<p>Master copies of procedures relating to students' union relations.</p> <p>Development of the institution's procedures relating to students' union relations.</p>	<p>A: Superseded + 5 years Copy to the University Archive after approval for permanent retention.</p> <p>D: Issue of procedures + 1 year</p>	

### Records Retention Schedule for Students' Union Relations (3)

<p><b>STUDENTS UNION/CONSTITUTION</b>            Activities involved in reviewing and approving the student's union constitution, other than formal review and approval by the institution's governing body:</p> <ul style="list-style-type: none"> <li>• reviewing and approving the student's union constitution, other than formal review and approval by the institution's governing body.</li> </ul> <p>The institution's governing body is required to formally review and approve the students union's constitution. For records relating to this process, use 16.3 <b>Governance – Governing Body Management</b>. Use this section for all other activities.</p>	<p>Process of reviewing the students' union's constitution, as required by s. 22(2) of the Education Act 1994</p>		<p>The governing body's formal review and approval of the students union's constitution will be recorded in the minutes of the appropriate meetings of the governing body. These records will be retained with the records of the governing body.</p>
<p><b>STUDENTS UNION/FUNDING</b>            Activities involved in providing funding for the institution's students' union:</p> <ul style="list-style-type: none"> <li>• providing funding for the institution's students' union.</li> </ul>	<p>Negotiating and agreeing funding to be provided by the institution to its students' union</p>	<p>Current financial year + 1 year</p>	
<p><b>STUDENTS UNION/FINANCE</b>            Activities involved in monitoring the financial affairs of the institution's students' union, other than formal monitoring and, where appropriate, approval by the institution's governing body:</p> <ul style="list-style-type: none"> <li>• monitoring the financial affairs of the institution's students' union, other than formal monitoring and, where appropriate, approval by the institution's governing body.</li> </ul>	<p>Reviewing the students' union's budgets, as required by s. 22(2) of the Education Act 1994</p> <p>Monitoring of the students' union's financial affairs, as required by s. 22(2) of the Education Act 1994</p>		<p>The governing body's formal review and approval of the students union's budgets will be recorded in the minutes of the appropriate meetings of the governing body.</p> <p>The governing body's formal review and approval of the students union's financial reports will be recorded in the minutes of the appropriate meetings of the governing body.</p>

### Records Retention Schedule for Students' Union Relations (4)

<p><b>STUDENTS UNION/OPERATIONS</b></p> <p>Activities involved in monitoring the operations of the institution's students' union:</p> <ul style="list-style-type: none"> <li>• monitoring the conduct of the students union's elections</li> <li>• monitoring the students' union's affiliations</li> <li>• monitoring and, where appropriate, investigating complaints against the students' union.</li> </ul>	<p>Monitoring of elections to major offices in the institution's students' union, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).</p> <p>Monitoring of students' union affiliations, as required by s. 22(2) of the Education Act 1994 (1994 c. 30).</p> <p>Investigation and reporting on complaints against the students' union by independent investigators appointed by the institution's governing body.</p>	<p>D: Settlement of complaint + 6 years</p>	<p>The governing body's formal review of the students union's elections will be recorded in the minutes of the appropriate meetings of the governing body.</p> <p>The governing body's formal review of the students union's affiliations will be recorded in the minutes of the appropriate meetings of the governing body.</p> <p>Limitation Act 1980 c.58 s5 Prescription and Limitation (Scotland) Act 1973 c.52 s6</p>
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