

Glasgow Caledonian University			
Records Retention Schedule	Foundation, Alumni and Events (FAE)		
Approved by	Jill Watt	Date	October 2020
Review Date	October 2025	Version	V1.5

Functions:

<ul style="list-style-type: none"> Alumni engagement 	<ul style="list-style-type: none"> Honorary Graduates
<ul style="list-style-type: none"> Alumni communications 	<ul style="list-style-type: none"> Corporate Events
<ul style="list-style-type: none"> Fundraising 	<ul style="list-style-type: none"> External hire of facilities
<ul style="list-style-type: none"> Donor and key stakeholder management 	

Code	Record series	Examples of records	Retention Trigger	Department Action	Records Centre (if used)	Retention Action (Total) Current Year (Cy)	Notes/Citation
	GCU Foundation, Alumni Engagement and Events Strategy	Departmental Operational plan Each function planning documents Quarterly KPI Reports	End of year	Retain electronically	n/a	Cy +5 years then Archives	
	Alumni Communications	Annual Magazine Monthly E-Newsletters Event Invitations Christmas cards Surveys	End of year	Retain a copy of cards/invitations for 5 years then send to Archives.	n/a	Retain for Archives	Hard copy/electronic
	Alumni Records	Individual record held in database - Email Update Forms - Magazine Carrier Sheet Updates	n/a	Retain permanently	n/a	Retain permanently Retain for Archives	

Code	Record series	Examples of records	Retention Trigger	Department Action	Records Centre (if used)	Retention Action (Total) Current Year (Cy)	Notes/Citation
		- Survey Responses - Volunteering					
	Fundraising Campaign Management	Strategy behind the campaign, case for support, press releases, planning documentation	End of year	Retain for 6 years and then Archive	n/a	Cy + 6 years then Archive	
	Gifts/Donation management	Cultivation plan Correspondence to cultivate gift/donation Gift agreement Donation Forms	n/a	Retain for 6 years	n/a	Retain permanently for Archives	
	Donor records	Individual record held in database	n/a	Retain permanently	n/a	Retain permanently for Archives	
	Donation management	Management/decisions/minutes relating to: Common Good Fund Scholarships Stewardship: Santander; Sir Alex Ferguson	End of year	Retain for 6 years	n/a	Retain for Archives	Hard copy and electronic records
	Honorary graduates	Photographs Speeches including laureator and recipient	End of year	Retain for 2 years		Retain for Archives	
	Corporate Events (these include Materclasses and Professorial Lectures)	Records documenting the planning and arrangements relating to events: Invitations Table plans Exhibitions Press releases	Completion of event	Retain for + 6 years. Copy to be sent to Archives	n/a	Cy + 6 years then Archives Service	
	Commercial Events	Commercial event contracts	End of event	Retain for 6 years	n/a	Retain for 6 years	Hard copy and electronic

Code	Record series	Examples of records	Retention Trigger	Department Action	Records Centre (if used)	Retention Action (Total) Current Year (Cy)	Notes/Citation
	Commercial Events	Records documenting the planning and arrangements: client and service provider communications, catering and IT services information	End of event	Retain for 3 years	n/a	Retain for 3 years	
	Commercial Events	Cold enquiry forms	From enquiry taken date	Retain for 3 years	n/a	Retain for 3 years	
	Commercial Events - Financial information	Income invoice request forms from Kinetics (events system). Cost invoices relating to services for events.	End of financial year	Retain for 6 years	n/a	Retain for 6 years	
	Commercial event client records	Individual record held in database	n/a	Retain permanently	n/a	Retain for Archives	
	External Exams	Exam questions and answer papers	End of exam	Retain for 30 days following exam and arrange shred it collection	n/a	n/a	