

UNIVERSITY OF BATH RECORDS RETENTION SCHEDULE

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01. GOVERNANCE & MANAGEMENT

Record type	Retention	Responsibility	Notes
Constitution			
Charter, Statutes and Ordinances	One copy to be deposited in the University Archives for permanent preservation.	Governance Office	-
Regulations	One copy to be deposited in the University Archives for permanent preservation.	Policy, Planning & Compliance	-
Standing Orders of Statutory Bodies	One copy to be deposited in the University Archives for permanent preservation.	Governance Office Policy, Planning & Compliance	-
Strategy and planning			
Institutional strategy documents	One copy to be deposited in the University Archives for permanent preservation.	Policy, Planning & Compliance	-
Institutional policy documents	One copy to be deposited in the University Archives for permanent preservation.	Policy, Planning & Compliance	-
University annual reports	One copy to be deposited in the University Archives for permanent preservation.	Marketing & Communications	-
University annual financial statements	One copy to be deposited in the University Archives for permanent preservation.	Finance & Procurement	-
Decision making			
Agenda, minutes and papers of the following: - Academic Assembly - Audit & Risk Assurance Committee (ARAC) - Boards of Studies (faculties/schools/doctoral)* - Committee on the Office of Chancellor - Committee on the Office of Vice-Chancellor - Convocation - Council - Courses and Partnerships Approval Committee (CPAC) - Court - Curriculum Transformation Committee - Education, Quality & Standards Committee (EQSC) - Finance Committee - Research Committee - Senate - University Executive Board (UEB)	One complete set of agenda, papers and minutes to be deposited in the University Archives for permanent preservation.	Governance Office *Faculty/School Directors of Administration/Doctoral College	-

01. GOVERNANCE & MANAGEMENT

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01. GOVERNANCE & MANAGEMENT

Record type	Retention	Responsibility	Notes
Decision making continued			
Declaration of interests forms, etc.	End of the current academic year + 10 years.	Governance Office	-
Chairs' action and decision by email papers (Council, Senate and their committees)	End of the current academic year + 3 years.	Governance Office Policy, Planning & Compliance	-
Academic department committees	End of the current academic year + 6 years.	Faculty Directors of Administration	-
Faculty/School committees	End of the current academic year + 6 years.	Faculty/School Directors of Administration	-
Boards of Examiners (Units and Programmes)	End of the current academic year + 6 years.	Faculty/School Directors of Administration	A formal record of decisions (minutes), and a full set of mark sheets should be filed with the Faculty Board of Studies records.
Ad hoc working groups not reporting to a University committee	End of the current academic year (or discontinuation of working group if its total lifespan is less than 3 years) + 6 years.	Working group secretary	-
Ad hoc working groups reporting to a University committee	End of the current academic year (or discontinuation of working group if its lifespan is less than 3 years) + 3 years.	Working group secretary	-
Election reports	End of the current academic year + 6 years.	Governance Office	-
Election nomination papers and statements	End of the current academic year + 6 years.	Governance Office	-
Election voting lists	End of the current academic year + 1 year.	Governance Office	-
Election voting papers	End of the current academic year + 1 year.	Governance Office	-
Election texts	End of the current academic year + 1 year.	Governance Office	-
Audit			
Internal audit reports	One copy of each internal audit report to be deposited in the University Archives for permanent preservation.	Internal Audit	-
Internal audit working papers	Date of publication of relevant internal audit report + 7 years (or longer if specified by contract).*	Internal Audit	Documentation relating to externally-funded activities may be retained for a longer period as specified by the external funder.

01. GOVERNANCE & MANAGEMENT

Record type	Retention	Responsibility	Notes
Legal affairs and compliance			
Freedom of Information Act access request documentation	Last action + 6 years.	FOI/Legal team	-
Data Protection Act Subject Access Request (SAR) documentation	Last action + 6 years.	Legal team	See also Data Protection Policy.
Agreements and contracts (including supporting documentation and legal advice)	End of contract agreement + 12 years.	Legal team	-
General legal advice provision	Last action + 6 years.	Legal team	-
Litigation with third parties	Last action + 6 years. Review.	Legal team	-
Data and statistics			
Non-statutory student survey target populations data sets	Closure of survey + six months after close of survey	Centre for Learning and Teaching (Student Engagement Team)	Contains personal data
Anonymised student survey results data sets	End of academic year + 10 years	Centre for Learning and Teaching (Student Engagement Team)	-
Statutory returns			
OfS National Student Survey target student population	Closure of survey + six months after close of survey	Centre for Learning and Teaching (Student Engagement Team)	Contains personal data

02. FINANCE

Record type	Retention	Responsibility	Notes
For University Finance Committee records see 01. Governance and Management.			
For University annual financial statements see 01. Government and Management.			
Accounting			
Subsidiary Company Accounts and Annual return	One copy of each statement to be transferred to the University Archives for permanent preservation.	Finance & Procurement	-
OfS/HEFEC/ONS submissions	End of the current financial year + 6 years.	Finance & Procurement	-
Insurance			
Evidence of liability insurance cover (including certificates, policies and schedules)	Retain permanently.	Finance & Procurement	-
Insurance administration and renewal documentation	Expiry + 6 years.	Finance & Procurement	-
Insurance claims documentation	Settlement of claim + 1 year.	Finance & Procurement	-
Insurance claims documentation involving asbestos	Retain permanently.	Finance & Procurement	-
Insurance claims documentation involving minors	Claimant reached the age of 21 + 1 year.	Finance & Procurement	-
Payroll and pensions administration			
Employee payroll records	End of the current financial year + 6 years.	Finance & Procurement	-
Employee pension files	Termination of employment + 75 years.	Finance & Procurement	-
Procurement			
Purchase orders	End of the current financial year + 6 years.	Academic departments & faculties	See also Procurement Policy.
Suppliers invoices, payment vouchers, credit card records and other transaction documentation	End of the current financial year + 6 years.	Finance & Procurement	-
New supplier/vendor documentation	End of the current financial year + 1 year.	Finance & Procurement	-
Supplier/vendor evaluation documentation	Contract expiry + 1 year.	Finance & Procurement	-
Tax			
Tax year-end returns (P35/P14)	End of the current financial year + 40 years.	Finance & Procurement	-
VAT returns	End of the current financial year + 6 years.	Finance & Procurement	-
Corporation tax returns	End of the current financial year + 6 years.	Finance & Procurement	-

03. HUMAN RESOURCES

Record type	Retention	Responsibility	Notes
For University Academic Staff Committee records see 01. Governance and Management.			
For University Remuneration Committee records see 01. Governance and Management.			
For University Grievance Committee records see 01. Governance and Management.			
Recruitment and selection			
Job applications and related interview documentation	Completion of appointment process + 6 months. Completion of appointment process + 7 years for roles resourced by in-house search team.	Human Resources	Stonefish e-Recruitment System. See also Applicant Privacy Notice .
Hourly-paid worker appointment documentation	Duration of engagement + 7 years.	Human Resources	Stonefish e-Recruitment System. See also Applicant Privacy Notice .
Executive search and recruitment data	Last interaction + 7 years.	Human Resources	Invenias.
Employment and employee relations			
Staff files	Duration of employment + 7 years. (With the exception of COSHH and asbestos health surveillance and exposure records.)	Human Resources	Covers digital staff records (held in iTrent) and paper staff records (held in the Department of Human Resources and in the University Records Centre). See also Workforce Data Protection and Privacy Statement .
Student/Tier 4 visa hourly paid worker management data	Duration of engagement + 7 years.	Human Resources	Student/Tier 4 Booking System. Anonymised data may be retained longer.
Non-Employment Status Assessment (NESA) records	Duration of engagement + 7 years.	Human Resources	
Workload Allocation Management System (WAMS) data	Duration of employment + 12 months.	Human Resources	See also WAMS Privacy Notice . Anonymised data may be retained longer.

03. HUMAN RESOURCES

Record type	Retention	Responsibility	Notes
Employment and employee relations continued			
Employment tribunal documentation	Last action + 6 years.	Human Resources	See also Staff Grievance Policy and Procedure .
Health and safety			
For University Health and Safety Committee records see 01. Governance and Management.			
Records relating to the investigation of accidents, dangerous occurrences, incidents involving hazardous substances and outbreaks of notifiable diseases	Closure of investigation + 40 years.	UHSE Human Resources	See also Asbestos Management Policy . See also Hazardous Substances Policy . Control of Substances Hazardous to Health Regulations 2002. Control of Asbestos at Work Regulations 2002.
Accident and incident records (including notifiable incidents, reportable incidents, and near misses)	Date of incident + 4 years.*	UHSE	*Longer retention is required where an incident involves a child.
RIDDOR reports for injuries and dangerous occurrences	Date of incident + 4 years.	UHSE	-
Occupational health surveillance and personal exposure records	Termination of employment + 40 years.	UHSE	-
Occupational safety and health training documentation	Termination of employment + 6 years.	UHSE Human Resources	See also Health and Safety Policy .
Occupational management reports	Termination of employment + 6 years.	UHSE Human Resources	-
Safety, Health & Environment newsletters	One copy of each edition to be deposited in the University Archives for permanent preservation.	UHSE	-
Risk assessment documentation	Superseded + 3 years.	Academic and professional departments	-
Fire risk assessments	Superseded + 3 years.	UHSE	See also Fire Safety Policy .
Health and safety inspections	Superseded + 3 years.	Academic and professional departments	See also Health and Safety Policy .

03. HUMAN RESOURCES

Record type	Retention	Responsibility	Notes
Health and safety continued			
Radiation workers records	Date of record + 30 years.	UHSE	Records held by the University's approved dosimetry service (ADS). See also Ionising Radiation Policy .
Staff training and development			
Staff mobility records	End of the current academic year + 6 years.	International Relations Office	-

04. PHYSICAL RESOURCES

Record type	Retention	Responsibility	Notes
Security			
Security incident reports	Date of report + 10 years.	Security	-
Lost and found property log	Date of log entry + 10 years.	Security	Items of unclaimed lost property are disposed of after 3 months.
Car parking permit register	Expiry of permit + 1 month.	Security	-
Car parking - exceptional circumstances applications	Date of application + 3 years.	Security	-
CCTV images	Creation + 3 months.*	Security	Longer retention may be required for investigatory purposes. See also the CCTV Code of Practice.
Access control records	Date of creation + 12 months.*	Security	*Records are deleted from the system on a monthly basis. See also Access Control Code of Practice.
Security pass and key issue records	Termination of employee role + 1 month.	Security	-
Property and facilities management			
Title deeds for properties owned by the University	Retain permanently.	Estates	-
Building project files	Project completion + 12 years.	Estates	-
Architectural drawings and plans	Demolition/transfer of ownership of building + review for archival value.	Estates	-

05. STUDENT ADMINISTRATION & SUPPORT

Record type	Retention	Responsibility	Notes
Student outreach, recruitment and admission			
School and college staff contact details	Academic year of enquiry/collection + 3 years.	Widening Participation Student Recruitment	See Widening Participation Privacy Notice.
Research and evaluation data relating to outreach and recruitment activities, projects and events	Project completion + 10 years.*	Widening Participation Student Recruitment	*Or while necessary for reference and planning purposes.
Participant data relating to outreach and recruitment activities, projects or events	Under 21 years old at the time of 1st outreach activity = data retained until participant reaches 30 years of age. Over 21 years old at the time of 1st outreach activity = data retained for 10 years.	Widening Participation	See Widening Participation Privacy Notice.
Applications and associated documents: unsuccessful applicants	Intended point of admission + 3 years.	Admissions	See Undergraduate Applicant Privacy Notice.
Applications and associated documents: successful applicants	Transferred to student academic record at point of admission.	Admissions	See Undergraduate Applicant Privacy Notice.
Applicant data submitted separately as part of any mitigating circumstances/criminal conviction checks: unsuccessful applicants	Intended point of admission + 1 year.	Admissions	See Undergraduate Applicant Privacy Notice.
Applicant data submitted separately as part of any mitigating circumstances/criminal conviction checks: successful applicants	Graduation/leaving + 6 years.	Admissions	See Undergraduate Applicant Privacy Notice.
Enquiries from prospective undergraduate or postgraduate taught course applicants (excluding MBA)	End of the admissions round + 1 year.	Admissions	-
Enquiries from prospective MBA, EMBA and Doctoral College applicants	Date of last inbound enquiry + 5 years.	MBA Admissions Doctoral College Admissions	-
Marketing and recruitment event and lead data held at prospective applicant contact level	Intended point of admission (expected year of entry) + 3 years.	Marketing	-
Complaints from unsuccessful applicants	Intended point of admission + 3 years.	Admissions	-
International student visa documentation	Graduation/leaving + 6 years.	Student Immigration	-

05. STUDENT ADMINISTRATION & SUPPORT

Record type	Retention	Responsibility	Notes
Student registration and administration			
Student academic record (SAMIS)	Retain core record permanently; remove all non-core data 6 years after graduation/leaving.	Academic Registry	Prior to the introduction of SAMIS, the core record is held in hardcopy format in the University Records Centre. See also Data Protection Statement for Student Registration.
Student academic record (Academic departments)	Graduation/leaving + 3 years.	Academic departments	-
HESA files	Permanent retention of anonymised student data snapshots prepared for submission to HESA.	Academic Registry	-
Conferment sheets and pass lists	One complete set to be retained permanently.	Academic Registry	-
Student finance			
University student bursary documentation	End of the current academic year + 6 years.	Admissions Student Finance	-
US Federal Aid documentation	Graduation/leaving + 6 years.	Admissions	-
Student debtor documentation	Last action + 6 years.	Credit Control Academic Registry	See Regulations 2.2-2.4.
Student accommodation			
Accommodation applications and residency contracts documentation	End of contract + 6 years.	Student Accommodation	-
Accommodation room transfer forms	End of the current academic year + 1 year.	Student Accommodation	-
Accommodation termination forms	End of the current academic year + 1 year.	Student Accommodation	-
Accommodation operational documentation	End of the current academic year + 1 year.	Student Accommodation	-
Accommodation third party provision documentation	End of the current academic year + 1 year.	Student Accommodation	-
Special applications for accommodation based on medical evidence	End of contract + 6 years.	Student Accommodation	-

05. STUDENT ADMINISTRATION & SUPPORT

Record type	Retention	Responsibility	Notes
Student complaints, appeals and discipline			
- For University Disciplinary Committee records see 01. Governance and Management. - For University Grievance Committee records see 01. Governance and Management.			
Student discipline files	Graduation/leaving + 6 years.	Policy, Planning & Compliance Student Services Academic departments	-
Student incident records	Graduation/leaving + 1 year.	Student Services Academic departments Student Accommodation	-
Student complaints documentation	Last action + 6 years.	Policy, Planning & Compliance	-
Student academic appeals files	Last action + 6 years.	Policy, Planning & Compliance Academic Registry	-
Student support			
Student Services casework files	Graduation/leaving + 6 years.	Student Services	-
Student mobility records	End of the current academic year + 6 years.	International Relations Office	-
Publications and publicity relating to services to support University of Bath students	Review for historical value + one copy to be deposited in the University Archives for permanent preservation	Student Services Careers Service, etc.	-
Records relating to the delivery of careers advice and support to individual service users	Graduation leaving + 6 years	Careers Service	-
Employer and employment opportunity data	While current	Careers Service	-
Student associations			
Students' Union constitution	Permanent retention.	Students' Union	-
Students' Union handbooks & guides	Permanent retention of a sample.	Students' Union	-
Students' Union newspaper	Permanent retention.	Students' Union	-

06. INFORMATION SERVICES

Record type	Retention	Responsibility	Notes
Data and information compliance			
For Data Protection Act Subject Access Request (SAR) documentation see 01. Governance & Management.			
For Freedom of Information Act access request documentation see 01. Governance & Management.			
Library			
Inter-Library loan request forms	End of the current academic year + 6 years.	Library	-
Library user records	Expiry of user status + 6 months.	Library	-
Archives & Research Collections catalogues	Permanent retention.	Library	-
Archives & Research Collections donor and depositor agreements and documentation	Life of collection + 6 years.	Library	-
Records Centre retrieval slips	End of the current calendar year + 3 years.	Library	-
Records Centre destruction authorisation forms	Destruction of records + 25 years.	Library	-
IT and computing			
Email (current user)	Deletion of email + 30 days.	DD&T	See also Email Policy.
User/email (non-current user)	Deactivation of account + 60 days.	DD&T	See also Email Policy.
Alternative communications (University managed Skype for Business, Microsoft Teams, VOIP)	Deactivation of account + 60 days.	DD&T	-
User account investigation (misconduct, security breach, etc) documentation	Last action + 6 years.	DD&T	-
Records documenting security breaches and attempted security breaches, and actions taken	Last action + 6 years.	DD&T	See also Electronic Information Systems Security Policy.
IT systems operating information (including keys, codes, certificates, operational information and manuals)	Discontinuation of system + 3 years.	DD&T	-
Requests to recover data from backup or archive.	Last action + 6 months.	DD&T	-

07. LEARNING & TEACHING

Record type	Retention	Responsibility	Notes
Academic quality and standards			
For Education, Quality & Standards Committee (EQSC) records see 01. Governance and Management.			
Submissions and outcome reports relating to formal institutional reviews of teaching quality and standards conducted by external organisations	One copy to be deposited in the University Archives for permanent preservation.	Academic Registry	-
Documentation relating to formal internal reviews of teaching quality and standards documentation	End of review + 10 years.	Academic Registry	-
Quality Assurance Code of Practice	Superseded + 10 years. Review for archival value.	Academic Registry	-
Programme development and delivery			
For University Academic Programmes Committee records see 01. Governance & Management.			
For University Courses and Partnerships Committee records see 01. Governance & Management.			
New programme proposals and programme variation proposals	Closure of consultation + 5 years.	Academic Registry	-
Programme and unit information submitted for setting up in SAMIS and programme/unit catalogues	End of the current academic year + 3 years.	Academic Registry	-
Agreements with partner and validated institutions (educational provision)	Termination of agreement + 6 years.	Learning Partnerships	-
Documentation relating to the approval and/or accreditation of taught programmes by external professional bodies.	End of programme + 10 years. Review for archival value.	Academic Registry	-
Courses on University of Bath virtual learning environment academic year end (July) snapshot	End of the current academic year + 5 years.	CLT	-
Recordings of lectures	End of the current academic year + 2 years.	DD&T	See also Ordinance 22.4. See also Teaching Capture Policy .
Student assessment			
For Boards of Examiners (Units and Programmes) records see 01. Governance & Management.			
For University Student Academic Appeals Committee records see 01. Governance & Management.			
Examination papers	One copy to be deposited in the University Archives for permanent preservation.	Academic Registry	-

07. LEARNING & TEACHING

Record type	Retention	Responsibility	Notes
Student assessment continued			
Assessed students' work for units not contributing to final award	Progression to next stage of course/withdrawal + 1 year.	Academic departments	-
Assessed students' work for units contributing to final award	Completion/withdrawal + 1 year.	Academic departments	-
Assessed students' work and associated documentation* for units contributing to final award which have been designated as for long-term retention.	Completion/withdrawal + 5 years.	Academic departments	*Please refer to the Designating units as for long-term retention of assessed students' work Procedure.
Postgraduate taught masters dissertations	Award + 5 years. Anonymised sampling to allow for comparisons of academic standards over time*. Destroy all non-sampled items.	Academic departments	*Contact the University Archivist for guidance on sampling. **The Library offers a parallel facility for the short-term, opt-in deposit of digital copies of exemplar dissertations.
Postgraduate research theses/dissertations	One copy to be deposited in the Library/University Archives for permanent preservation.	Academic departments	-
External examiners' reports	End of the current academic year + 6 years.	Faculty Executive Assistants Academic Registry	-
Graduation			
Award ceremony brochures	One copy to be deposited in the University Archives for permanent preservation.	Academic Registry	-
Graduation ceremony films	Review for archival value + retain permanently.	DD&T	Consent to be filmed is a requirement of attendance at a University graduation ceremony.
Award ceremony preparation documentation	Award ceremony + 1 year.	Academic Registry	-
Degree verification correspondence	End of the current academic year + 1 year.	Academic Registry	-

08. RESEARCH & DEVELOPMENT

Record type	Retention	Responsibility	Notes
Strategy, quality and ethics			
- For University Research & Knowledge Exchange Committee records see 01. Governance and Management. - For University Ethics Committee records see 01. Governance and Management.			
Final reports relating to formal institutional reviews of research quality and standards conducted by external organisations	One copy to be deposited in the University Archives for permanent preservation.	RIS	-
Development and administration			
Research development and collaboration project documentation	Project completion + 6 years.*	RIS	*Longer if specified by legislation or funding agreement.
Research project administration files	Project completion + 6 years.*	RIS	*Longer if specified by legislation or funding agreement.
Unsuccessful research grant applications	Withdrawal/rejection + 3 years.	RIS	-
Research project approval files (BRD)	Project completion + 6 years.	Health	-
Abandoned/withdrawn research project approval files (BRD)	Withdrawal/abandonment + 3 years.	Health	-
Research data and supporting documents for legal compliance (including consent forms)	Project completion + 10 years.*	Library	*Shorter or longer if specified by funding agreement or for continuing archival value. See also Research Data Policy.
Dissemination and enterprise			
Final research outputs	One copy to be deposited in the University's CRIS for permanent preservation.	Library	See also Open Access Publications Deposit Mandate.
Intellectual property rights (IPR) contracts and agreements	Termination + 20 years.	RIS	*Longer if specified by legislation or funding agreement.
Intellectual property rights (IPR) correspondence	Current financial year + 6 years.	RIS	-
Patents applications and renewals	Life of patent + 20 years.	RIS	-

08. RESEARCH & DEVELOPMENT

Record type	Retention	Responsibility	Notes
Dissemination and enterprise continued			
Patents correspondence	Current financial year + 6 years.	RIS	-
Research consultancy documentation	Completion of consultancy + 6 years.	RIS	*Longer if specified by legislation or funding agreement.
Knowledge transfer partnership (KTP) programme files	Completion of programme + 6 years	RIS	*Longer if specified by legislation or funding agreement.

09. EXTERNAL RELATIONS

Record type	Retention	Responsibility	Notes
Alumni			
Records of individual alumni, donors and supporters, and their relationship with the University	Permanent retention*	Advancement Office	*Or until an individual asks for their details to be removed at which point only a minimised, core record will be retained. See also the Privacy Policy for Alumni, Donors & Friends.
Surveys and update forms	Entry onto database + 6 months.	Advancement Office	See also the Privacy Policy for Alumni, Donors & Friends.
Records relating to the planning, organisation and administration of events for alumni, donors and supporters	Event + 6 years. Review for continuing operational/historical value.	Advancement Office	-
Records relating to the planning, production and distribution of communications with alumni, donors and supporters	Communication + 6 years. Review for continuing operational/historical value.	Advancement Office	-
Donation records (Including major gift agreements)	Entry onto database, fulfilment of gift + 6 years.	Advancement Office	-
Gift aid forms	Permanent retention.*	Advancement Office	*Superseded forms to be destroyed on receipt of an update.
University of Bath Foundation Ltd Board of Trustees minutes of meetings and associated records	Discontinuation of Foundation + 6 years.	Advancement Office	-
University of Bath Foundation Ltd financial transaction records	Date of gift + 6 years.	Advancement Office	-
Alumni magazines, impact reports and other publications	One copy to be deposited in the University Archives for permanent preservation.	Advancement Office	-
Marketing and recruitment			
University prospectus	One copy to be deposited in the University Archives for permanent preservation	Admissions	-

09. EXTERNAL RELATIONS

Record type	Retention	Responsibility	Notes
Government and regulator relations			
HESA files	Permanent retention of anonymised student data snapshots prepared for submission to HESA.	Academic Registry	-
Graduate data (HESA Graduate Outcomes survey) - identifiable graduate contact details submitted to HESA	Academic year of submission to HESA + 5 years	Careers	e.g. For 2017/18 leavers the academic year of submission to HESA = 2018/19. Aim to delete by Sept. 2024 at latest.
Graduate data (HESA Graduate Outcomes survey) - identifiable graduate survey results from HESA	Academic year of survey census + 5 years	Careers	e.g. For 2017/18 leavers the academic year of survey census = 2018/19. Review Sept. 2024 if to delete in Nov. 2024 or keep for a further year to establish a 5-year dataset.

October 2026