12 TRAINING AND EVENT RECORDS

University Retention Schedule

Contents

12.1.   Training Sessions and Events

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	DEPT PROVIDING TRAINING RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Programmes and schedules	E	Completion of event	5 years	Delete / Archive†	JISC recommendation	† Archive papers relating to significant events (for example: inauguration of Chancellors, laying of foundation stones, ceremonial openings, inaugural lectures etc)	HR – K:drive, HR system, Google Drive & Google Calendar IS – Google Calendar & HR System DCQE – K:drive	Pre-2010 – Compel & printed calendars	Intranet	DP CC IP Pres
Documents concerning administration of training events	E	Completion of event	1 year	Delete	To provide reference material for developing next event	Examples: invitations; list of attendees	HR – HR System, Core Strengths Presenter, Google Drive, Google email & K:drive IS – Google email, HR System, eRecords System & Google Drive DCQE – Procedures & K:drive Spreadsheet	N/A	Not published	DP CC IP Pres
Presentations and training materials	P/E	When superseded	1 year	Destroy	In case of queries concerning previous versions	IS keep an operational copy in the Training account N:drive, for use in the training room	DCQE – K:drive HR – Moodle, Core Strengths Presenter, BrightSpace, Google Drive & K:drive IS – eRecords System (drafted in Google)	N/A	Event packs (paper & electronic), Google Drive (to delegates only) HR – Google Communities and Google Sites	DP CC IP Pres
Acceptance/option forms	E	Completion of event	N/A	Delete						DP CC IP Pres
Records of attendance*	P	Completion of event	1 year	Destroy		* This schedule covers attendance at events/training sessions which are not formally recorded on the HR system. Records of formal training received by individuals are covered by Retention Schedule – 06 Human Resources > Induction, Probation and Personal Development	Local filing			DP CC IP Pres

12.1.1. Records Relating to the Provision of Health & Safety Training

The provision of information, instruction and training courses with regard to workstations, first aid, fire safety, exposure to asbestos, exposure to hazardous substances, exposure to lead, exposure to noise and exposure to ionising radiation are covered in **Retention Schedule – 08 Risk Management > Health and Safety**.

Records of formal training received by individuals are held on the HR System and covered by **Retention Schedule – 06 Human Resources > Induction, Probation and Personal Development**.

12.1.2. Subsidiary Company Training Records

A new schedule has been created to cover the specific retention requirements for subsidiary companies (e.g. ASTA). This section is now covered be the new schedule. See **Retention Schedule – 13 Subsidiary Records**.

12.2.   Catering Services

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CAMPUS SVS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Provisional bookings, which are then confirmed	P/E	Receipt of function form	N/A	Destroy			KX system	N/A	Not published	DP CC IP Pres
Provisional bookings, which are not confirmed	P/E	Day after proposed event	N/A	Destroy			KX system	N/A	Not published	DP CC IP Pres
Function forms	P/E	End of academic year	1 year	Destroy			KX system	N/A	Not published	DP CC IP Pres
Loyalty scheme	E	End of academic year	3 years	Delete			MCR (3rd party)	N/A	Not published	DP CC IP Pres
Temperature monitoring	E	End of academic year	3 years	Delete	Regulation 32 / Schedule 4 of the Food Safety and Hygiene (England) Regulations 2013		MONICA (3rd party)	N/A	Not published	DP CC IP Pres

12.3. Conferences and Lettings

NB: Paperless for bookings and enquiries from 2017

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	CAMPUS SVS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Schedule of charges	E	End of academic year	6 years	Delete			Secure K:drive	Head of C&L's N:drive	Not published	DP CC IP Pres
Enquiries	E	End of calendar year	2 year	Delete	It can take 18 months from initial enquiry to confirmation of booking	NB: includes responses provided	Secure K:drive	Head of C&L's N:drive	Not published	DP CC IP Pres
Provisional bookings, which are then confirmed	E	Booking confirmed	N/A	Delete			Secure K:drive & KX System	Head of C&L's N:drive	Not published	DP CC IP Pres
Provisional bookings, which are not confirmed	E	End of calendar year	2 year	Delete	It can take 18 months from initial enquiry to confirmation of booking		Secure K:drive & KX System	Head of C&L's N:drive	Not published	DP CC IP Pres
Confirmed bookings	E	Completion of conference / event	6 years	Delete	Limitation Act 1980		Secure K:drive & KX System	Head of C&L's N:drive	Not published	DP CC IP Pres
Terms and conditions of bookings	E	Completion of conference / event	6 years	Delete	Limitation Act 1980		Secure K:drive & KX System	Head of C&L's N:drive	Not published	DP CC IP Pres