# ucisa Retention Schedule

| Data | Retention Period |
|---|---|
| Membership database<br>Personal details<br>Name, address, email address(es), telephone number(s). | For the duration of their membership of ucisa. All membership data except for the member's name is removed from the Organisation's database within one week of notification of cessation of membership. |
| Members directory<br>Personal details<br>Name, address, email address(es), telephone number(s). Role in ucisa group ie institutional representative, executive committee member, special interest group member, correspondent*. | For the duration of their membership of ucisa. All membership data except for the member's name is removed from the Organisation's database within one week of notification of cessation of membership.<br>For members withdrawing only from a special interest group or subject, only the contents of the relevant field of the directory record will be deleted. |
| Financial information about member organisations. | Financial information for member organisations is not retained<br>Credit cards – used and processed directly by Barclays EPDQ to which ucisa has no access; Members paying on invoice do not require ucisa to have their bank details. |
| Personal financial information provided by members, volunteers, trustees for claiming expenses. | ucisa will retain financial data you provide for as long as it is needed for the relevant purpose and in line with data security best practice. |
| Events<br>Participant registration data. | Registration data at Organisation's events and other activities will be retained for a period of 3 months following the event. Special category data will be deleted immediately after the event. |
| Event feedback form<br>Name & email address with comments | Personal details are not mandatory to enter when providing comments. However, any personal details provided voluntarily in the feedback will be removed during the processing of feedback and for no longer than 3 months following the event. |
| Survey of members, including special interest subjects generating summary statistics.<br>Name & email address with comments | Personal details are not mandatory; details of the member institution are required. Survey results or summary statistics are held in 2 files:<br>1 Secured version of survey results can be accessed strictly by named representatives of 'full member' institutions;<br>2 General access version of survey results is stripped of *all* identifying data, including institution names and may be accessed by anyone.<br><br>Any personal details provided voluntarily in the survey are removed during the processing of survey results. |

| Data | Retention Period |
|------|------------------|
| Bursary candidates<br>Name, address, organisation, email, telephone number application, photograph | Data collected during the Bursary applications and judging process:<br>1 successful applicants' names – published on the website<br>are subject to website data retention policy;<br>2 unsuccessful applicants – all data except for the applicant name, will be deleted within 3 months of the judging date.<br><br>All data created during the process, for applicants and judging, is secured with multi-level access controls in a secure location. |
| Website data<br>Personal details:<br>Name, job title, institution name, email address and photograph | Data for trustees, officers, executive committee, and all committees/ Special Interest Groups is retained for the duration of their role in each of the named groups. |

*Correspondent is a ucisa member who may not a member of a stated group, but has expressed an interest in a particular group.

## Retention periods - summary

Hopefully, most of the periods outlined below are self-explanatory. By *superseded* it is meant that one version of a document is replaced by another (e.g. when version 1 of a policy is replaced by version 2 or 2018 by 2019). Items reaching their archive date, will be automatically archived unless a review/update has been completed. It is the Groups' responsibility to carry out these reviews (i.e. when NG get to 2019, it should be scheduled into their Business Plan to review the Best Practice Guide on *Exploiting and protecting the network).*

| Title | Total Retention | Notes |
|---|---|---|
| News | Date first published + 2 months | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Events (inc pdfs of presentations/event reports) | Date of event + 3 years | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Photos | Stored on external sites (such as Flickr, Mediasite, Youtube) then linked | N/A |
| Position statements (consultations and responses etc) | Date first published + 3 years | |
| Press releases | Date first published + 2 months | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Publications (Guides, Toolkits, Handbooks, Conference Proceedings* etc) | Date first published + 3 years | Keep (on ucisa website) |
| Executive Strategy documents (inc AGM papers, Exec minutes/papers etc) | Until replaced by updated version or Date first published + 3 years | Keep (on ucisa website) |
| Group documentation (inc Minutes, Annual Reports and Business Plans | Date first published + 3 years | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Policies and procedures | Date superseded + 3 years | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Surveys inc HEITS | Date first published + 5 years | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |
| Awards | Date first published + 3 years | Keep winners submission (on ucisa website) |
| Staff details | Until staff departure + 7 years | |
| General content | Date first published + 6 years | Archived to Jisc National Archive at https://web.archive.org/web/*/http://ucisa.ac.uk/ |

| Admin | Date first published + 6 year | Special admin-only schedule for overriding other rules |
|-------|-------------------------------|--------------------------------------------------------|

\* **By** *Conference Proceedings*, **we mean a formal publication that identifies the key issues presented and discussed within an event. (This would be considerably more detailed than a standard event report).**

**November 2019**