

Function – Strategic Planning and Development (v1 November 2024)

Responsible Person – Director of Strategic Planning & Development

	Type of Records	RETENTION PERIOD	DISPOSAL ACTION	Notes (for example statutory reason for specified retention period)
	Strategic Planning			
1	Records documenting the development and establishment of the institution's corporate planning and performance management policies and strategy: key records.	Superseded + 10 years	Archive	
2	Records documenting the development and establishment of the institution's corporate planning and performance management policies, strategy, and procedures: working papers.	Superseded + 3 year	Archive	To aid with understanding decision making for future development
3	Master copies of procedures relating to corporate planning and performance management.	Superseded + 5 years	Archive	
4	Data on, and analyses of, the institution's performance against its strategic plan.	Current academic year + 5 years	Delete	
5	Reports on the institution's performance against its strategic plan.	Current academic year + 10 years	Archive	
6	Records documenting the conduct and results of audits and reviews of the strategic planning and performance management function, and responses to the results.	Current academic year + 5 years	Delete	
7	Records documenting the development of the institution's annual operating plans: key records.	Current year + 5 years	Archie	
8	Records documenting the development of the institution's annual operating plans: working papers.	Current year + 2 year	Delete	To aid with understanding decision making for future development
9	Records documenting the development of the institution's key performance indicators.	Superseded +5 year	Delete	To aid with understanding internal reporting requirements

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10	Records documenting benchmarking exercises with other comparable institutions.	Current + 5 year	Delete	
11	Records documenting performance monitoring and analysis.	Current year + 5 year	Archive	Reporting on KPIs is often lagged for different purposes so having records is useful for context and guidance
	Strategic Programme Management Office			
12	Records documenting the implementation of strategic change programmes and significant strategic change projects: key records.	Current year + Life of Programme/Project + 3 Year	Archive	Revised procedures, structures or other operational information may be held in host departments on an on-going basis until superseded, but programme/project records can be archived.
13	Records documenting the implementation of strategic change projects: key records.	Current year + Life of Project + 3 Year	Archive	Revised procedures, structures or other operational information may be held in host departments on an on-going basis until superseded, but project records can be deleted.