04 COMMUNICATIONS AND MARKETING RECORDS

University Retention Schedule

Contents

    4.1.1. Events and Training Evaluation ........................................................................................................... 3
    4.1.2. Market Research ................................................................................................................................. 3
4.2. Public Relations ........................................................................................................................................ 4
4.3. Media Relations ...................................................................................................................................... 5
4.4. Recruitment and Outreach ....................................................................................................................... 6
    4.4.1. Up for IT Club (historic – ceased 2014) ............................................................................................ 7
4.5. Alumni Relations .................................................................................................................................... 7
4.6. Publications and Promotional Work ......................................................................................................... 8
    4.6.1. Corporate Identity .............................................................................................................................. 9

Please note: For student feedback on courses and units - see Retention Schedule – 02 Audit Records > Programme Quality, Monitoring & Review

<table>
<thead>
<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>OWNING DEPT RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records relating to the design and conduct of the survey or feedback questionnaire</td>
<td>P/E</td>
<td>Completion of survey / questionnaire</td>
<td>5 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>K:drive</td>
<td>K:drive &amp; local filing cabinet</td>
<td>Not published</td>
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</tr>
<tr>
<td>Individual responses</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>N/A</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>K:drive</td>
<td>K:drive &amp; VLE</td>
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<td></td>
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<tr>
<td>Analysis of responses</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>5 years*</td>
<td>Destroy</td>
<td>For example: Reports, Summaries, Statistics *Or until completion of the next survey, if comparisons need to be made</td>
<td>K:drive</td>
<td>K:drive &amp; VLE</td>
<td>Not published</td>
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<td></td>
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<tr>
<td>Analysis of responses – Staff Survey only</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>10 years</td>
<td>Destroy</td>
<td>For example: Reports, Summaries, Statistics</td>
<td>K:drive</td>
<td>K:drive &amp; VLE</td>
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<td></td>
</tr>
<tr>
<td>Ad-hoc individual feedback comments or forms</td>
<td>P/E</td>
<td>End of academic year</td>
<td>1 year</td>
<td>Destroy</td>
<td>NB: includes responses provided</td>
<td>K:drive</td>
<td>K:drive &amp; VLE</td>
<td>Not published</td>
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### 4.1.1. Events and Training Evaluation

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<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>OWning DePT RENTENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STOREd IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Event or training feedback and evaluation forms – individual responses</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>N/A</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>DCQE – Locked cabinet HR – Google Drive IS – Google Sheets</td>
</tr>
<tr>
<td>Event or training feedback and evaluation forms – Analysis of responses</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>5 years*</td>
<td>Destroy</td>
<td></td>
<td>For example: Reports, Summaries, Statistics *Or until completion of the next survey, if comparisons need to be made</td>
<td></td>
<td></td>
<td></td>
<td>DCQE – K:drive HR – K:drive &amp; Google Drive IS – K:drive &amp; eRecords (drafted in Google)</td>
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### 4.1.2. Market Research

<table>
<thead>
<tr>
<th>RECORd CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>OWning DePT RENTENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STOREd IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market research data – relating to identifiable individuals</td>
<td>P/E</td>
<td>Completion of research</td>
<td>N/A</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td></td>
<td></td>
<td>VLE (Restricted Access)</td>
<td>Not published</td>
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</tr>
<tr>
<td>Market research data – aggregated data and analysis</td>
<td>P/E</td>
<td>Completion of analysis</td>
<td>5 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>For example: Reports, Summaries, Statistics</td>
<td></td>
<td></td>
<td></td>
<td>K:drive &amp; local filing cabinet</td>
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### 4.2. Public Relations

<table>
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<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>MARKETING &amp; COMMS RETENTION PERIOD</th>
<th>FACULTIES RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public events and campaigns</td>
<td>P/E</td>
<td>Completion of event / campaign</td>
<td>5 years</td>
<td>Destroy</td>
<td>To provide reference material for organising subsequent events</td>
<td>K:drive</td>
<td>L:drive</td>
<td>Website &amp; Emails</td>
<td>Website &amp; Emails</td>
<td>Website &amp; Emails</td>
<td><img src="status.png" alt="RAG Status" /></td>
</tr>
<tr>
<td>Details of individuals signed up to Marketo</td>
<td>E</td>
<td>Individual’s consent withdrawn*</td>
<td>N/A</td>
<td>Destroy</td>
<td>Data Protection Act 2018 &amp; GDPR &amp; * or if consent is not explicitly renewed when requested, during periodic review of mailing lists</td>
<td>Marketo</td>
<td>N/A</td>
<td>N/A</td>
<td><img src="status.png" alt="RAG Status" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Corporate sponsorship arrangements</td>
<td>P/E</td>
<td>Termination of sponsorship</td>
<td>6 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td></td>
<td></td>
<td></td>
<td>Website &amp; Emails</td>
<td>Website &amp; Emails</td>
<td><img src="status.png" alt="RAG Status" /></td>
</tr>
<tr>
<td>Records of donors and donations to the University</td>
<td>P/E</td>
<td>End of financial year</td>
<td>6 years</td>
<td>Destroy</td>
<td>Limitation Act 1980</td>
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<td></td>
<td></td>
<td>Website &amp; Emails</td>
<td>Website &amp; Emails</td>
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### 4.3. Media Relations

<table>
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<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>MARKETING &amp; COMMS RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records of media contacts</td>
<td>P/E</td>
<td>When superseded</td>
<td>N/A</td>
<td>Destroy</td>
<td>Stashed by external supplier. Not UoP records</td>
<td>N/A</td>
<td>N/A</td>
<td>Not published</td>
<td>![Green, Blue, Red]</td>
<td>![Green]</td>
</tr>
<tr>
<td>Press releases – significant events</td>
<td>P/E</td>
<td>N/A</td>
<td>permanent</td>
<td>Archive</td>
<td>To preserve a historical record of the development of the University</td>
<td>K:drive</td>
<td>L:drive</td>
<td>Published on website and issued to media</td>
<td>![Green, Blue, Red]</td>
<td>![Green]</td>
</tr>
<tr>
<td>Press releases - other</td>
<td>P/E</td>
<td>End of academic year</td>
<td>5 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>K:drive</td>
<td>L:drive</td>
<td>Published on website and issued to media</td>
<td>![Green, Blue, Red]</td>
<td>![Green]</td>
</tr>
<tr>
<td>Transcripts of media briefings and interviews</td>
<td>P/E</td>
<td>End of academic year</td>
<td>5 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>K:drive</td>
<td>L:drive</td>
<td>Not published</td>
<td>![Green, Blue, Red]</td>
<td>![Green]</td>
</tr>
<tr>
<td>Monitoring and analysis of media coverage of the University</td>
<td>P/E</td>
<td>End of academic year</td>
<td>5 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td>K:drive</td>
<td>L:drive</td>
<td>Not published</td>
<td>![Green, Blue, Red]</td>
<td>![Green]</td>
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### 4.4. Recruitment and Outreach

<table>
<thead>
<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>MARKETING &amp; COMMS RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
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</thead>
<tbody>
<tr>
<td>Programme of events</td>
<td>E</td>
<td>Completion of event</td>
<td>21 years</td>
<td>Destroy</td>
<td>To tie in with HEAT reporting. Youngest child on event would be 9 yrs old</td>
<td>For example: talks; workshops; taster days; information days; summer schools</td>
<td>Google Diary and also on RAO database and K:drive</td>
<td>Google Diary and also on RAO database and K:drive</td>
<td>Not published</td>
<td></td>
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<tr>
<td>Administration of events</td>
<td>E</td>
<td>Completion of event</td>
<td>1 year</td>
<td>Destroy</td>
<td></td>
<td>K:drive</td>
<td>K:drive (RAO shared drive)</td>
<td>Not published</td>
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<tr>
<td>Holiday workshop attendees (Discontinued)</td>
<td>P/E</td>
<td>Date of application</td>
<td>2 years</td>
<td>Destroy</td>
<td>Preparation for CRM</td>
<td>Secondary School Children. Signed parental consent required Data also entered on HEAT (see below)</td>
<td>RAO paper filing &amp; RAO paper filing</td>
<td>Personal details, only if consent is given for photograph in newsletter</td>
<td></td>
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<tr>
<td>Mentees (Discontinued)</td>
<td>P/E</td>
<td>Date of summer school selection form</td>
<td>2 years</td>
<td>Destroy</td>
<td>Preparation for CRM</td>
<td>Data also entered on HEAT (see below)</td>
<td>Google Drive</td>
<td>K:drive</td>
<td>Not published</td>
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<tr>
<td>Summer school attendees (Discontinued)</td>
<td>P/E</td>
<td>Date of application</td>
<td>2 years</td>
<td>Destroy</td>
<td>Preparation for CRM</td>
<td>Residential attendees. Signed parental consent required Data also entered on HEAT (see below)</td>
<td>Locked file storage</td>
<td>??</td>
<td>Not published</td>
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<tr>
<td>Student ambassadors &amp; Student mentors</td>
<td>E</td>
<td>End of role</td>
<td>6 years*</td>
<td>Destroy</td>
<td>HR Protocol * Paperwork is disposed after 6 months</td>
<td>iTrent</td>
<td>iTrent</td>
<td>Not published</td>
<td></td>
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<tr>
<td>Data entered into Higher Education Access Tracker (HEAT)</td>
<td>E</td>
<td>Date of birth</td>
<td>30 years</td>
<td>Delete</td>
<td>Data held on HEAT database until the child’s 30th birthday</td>
<td>Database managed by PCC. Data sharing agreement is in place</td>
<td>HEAT Database</td>
<td>N/A</td>
<td>Not published</td>
<td></td>
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<tr>
<td>Leads</td>
<td>E</td>
<td>End of year of application</td>
<td>2 years</td>
<td>Delete</td>
<td></td>
<td>The year of application can be inferred from the date of the prospectus ordered or the event attended</td>
<td>N/A</td>
<td>Not published</td>
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<tr>
<td>Student Profiles</td>
<td>E</td>
<td>Expiry of consent</td>
<td>N/A</td>
<td>Delete</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td>Not published</td>
<td></td>
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<tr>
<td>RECORD CATEGORY</td>
<td>FORMAT</td>
<td>RETENTION PERIOD BEGINS</td>
<td>MARKETING &amp; COMMS RETENTION PERIOD</td>
<td>DISPOSAL ACTION</td>
<td>RATIONALE</td>
<td>NOTES</td>
<td>MASTER SHOULD BE STORED IN</td>
<td>HISTORICAL INFO</td>
<td>PUBLICATION INFO</td>
<td>RAG STATUS</td>
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<td>Expiry of consent</td>
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<tr>
<td><strong>4.4.1. Up for IT Club (historic – ceased 2014)</strong></td>
<td></td>
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<td></td>
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<tr>
<td>Membership records</td>
<td>P/E</td>
<td>Termination of membership</td>
<td>6 years</td>
<td>Destroy</td>
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<tr>
<td>Records of volunteers</td>
<td>P/E</td>
<td>Departure of volunteer</td>
<td>6 years</td>
<td>Destroy</td>
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<td><strong>4.5. Alumni Relations</strong></td>
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</tr>
<tr>
<td>Contact and course details of individual alumni</td>
<td>P/E</td>
<td>When superseded</td>
<td>N/A</td>
<td>Destroy</td>
<td></td>
<td></td>
<td></td>
<td>Virtual Server 007</td>
<td>Virtual Server 007</td>
<td>Not published</td>
</tr>
<tr>
<td>Summarised / anonymised statistical data of alumni</td>
<td>P/E</td>
<td>End of academic year</td>
<td>10 years</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td></td>
<td></td>
<td>Virtual Server 007</td>
<td>K:drive / N:drive</td>
<td>Not published</td>
</tr>
<tr>
<td>Records concerning the administration of alumni events</td>
<td>P/E</td>
<td>Completion of event</td>
<td>1 year</td>
<td>Destroy</td>
<td>JISC recommendation</td>
<td></td>
<td></td>
<td>Eventbrite &amp; K:drive</td>
<td>Eventbrite</td>
<td>Not published</td>
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## 4.6. Publications and Promotional Work

<table>
<thead>
<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>MARKETING &amp; COMMS RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records concerning the commissioning, design, editing, approval and production of publications and promotional materials</td>
<td>P/E</td>
<td>Date of publication</td>
<td>1 year</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>N/A</td>
<td>Hard copies of job sheets &amp; proofs</td>
<td>Electronic PDFs – K:drive</td>
<td>Not published</td>
</tr>
<tr>
<td>Final versions</td>
<td>P/E</td>
<td>Date of publication</td>
<td>5 years</td>
<td>Destroy or Archive†</td>
<td>Potential historical value</td>
<td></td>
<td></td>
<td>University Archive Electronic – K:drive &amp; Designers' Server (Print Services)</td>
<td>Produced &amp; distributed to internal and external audience depending on the job</td>
<td></td>
</tr>
<tr>
<td>Staff newsletter – ‘Communicator’</td>
<td>P/E</td>
<td>N/A</td>
<td>permanent</td>
<td>Archive</td>
<td>Historical value</td>
<td></td>
<td>K:drive &amp; Designers’ Server (Print Services)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Records concerning the development and placing of advertisements</td>
<td>P/E</td>
<td>End of academic year</td>
<td>5 years</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>K:drive</td>
<td></td>
<td>Public</td>
<td></td>
</tr>
<tr>
<td>Web protocols</td>
<td>P/E</td>
<td>When superseded</td>
<td>1 year</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>K:drive</td>
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<td>Published on Document Warehouse</td>
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## 4.6.1. Corporate Identity

<table>
<thead>
<tr>
<th>RECORD CATEGORY</th>
<th>FORMAT</th>
<th>RETENTION PERIOD BEGINS</th>
<th>MARKETING &amp; COMMS RETENTION PERIOD</th>
<th>DISPOSAL ACTION</th>
<th>RATIONALE</th>
<th>NOTES</th>
<th>MASTER SHOULD BE STORED IN</th>
<th>HISTORICAL INFO</th>
<th>PUBLICATION INFO</th>
<th>RAG STATUS</th>
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</thead>
<tbody>
<tr>
<td>Guidelines</td>
<td>P/E</td>
<td>When superseded</td>
<td>1 year</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>K:drive</td>
<td>K:drive</td>
<td>Published on website and in print</td>
<td><img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /></td>
</tr>
<tr>
<td>Logos and templates</td>
<td>P/E</td>
<td>When superseded</td>
<td>1 year</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>K:drive &amp; Designers’ Server (Print Services)</td>
<td>K:drive &amp; Designers’ Server (Print Services)</td>
<td>Published on website</td>
<td><img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /></td>
</tr>
<tr>
<td>Records concerning the development and design of logos and templates</td>
<td>P/E</td>
<td>When superseded</td>
<td>N/A</td>
<td>Destroy</td>
<td></td>
<td></td>
<td>N/A</td>
<td>Hard copies of job sheets &amp; proofs Electronic proofs on Designers’ Server (Print Services)</td>
<td>Not published</td>
<td><img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /> <img src="RAG_3" alt="RAG_3" /></td>
</tr>
</tbody>
</table>

Guidelines: P/E When superseded 1 year Destroy K:drive K:drive Published on website and in print

Logos and templates: P/E When superseded 1 year Destroy K:drive & Designers’ Server (Print Services) K:drive & Designers’ Server (Print Services) Published on website

Records concerning the development and design of logos and templates: P/E When superseded N/A Destroy N/A Hard copies of job sheets & proofs Electronic proofs on Designers’ Server (Print Services) Not published