



04 COMMUNICATIONS AND MARKETING RECORDS

University Retention Schedule

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4.1. Surveys, Feedback, Evaluation Forms and Market Research

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

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

4.1.1. Events and Training Evaluation

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	OWNING DEPT RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Event or training feedback and evaluation forms – individual responses	P/E	Completion of analysis	N/A	Destroy	JISC recommendation		DCQE – Locked cabinet HR – Google Drive IS – Google Sheets	N/A	Not published, but may be shared with course presenters	
Event or training feedback and evaluation forms – Analysis of responses	P/E	Completion of analysis	5 years*	Destroy	JISC recommendation	For example: Reports, Summaries, Statistics *Or until completion of the next survey, if comparisons need to be made	DCQE – K:drive HR – K:drive & Google Drive IS – K:drive & eRecords (drafted in Google)	HR – K:drive	HR – Quotes and Stats on web pages	

4.1.2. Market Research

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	OWNING DEPT RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Market research data – relating to identifiable individuals	P/E	Completion of research	N/A	Destroy			K:drive	VLE (Restricted Access)	Not published	
Market research data – aggregated data and analysis	P/E	Completion of analysis	5 years	Destroy		For example: Reports, Summaries, Statistics	K:drive	K:drive		

4.2. Public Relations

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	FACULTIES RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Public events and campaigns	P/E	Completion of event / campaign	5 years		Destroy	To provide reference material for organising subsequent events		K:drive	L:drive	Website & Emails	
Details of individuals signed up to Marketo	E	Individual's consent withdrawn*	N/A		Delete	Data Protection Act 2018 & GDPR	* or if consent is not explicitly renewed when requested, during periodic review of mailing lists	Marketo	N/A	N/A	
Corporate sponsorship arrangements	P/E	Termination of sponsorship		6 years	Destroy	JISC recommendation					
Records of donors and donations to the University	P/E	End of financial year	6 years		Destroy	Limitation Act 1980 Tax purposes		CRM system	K:drive		
Records relating to legacy bequests	P/E	Duration of the bequest	6 years		Destroy / Archive	Limitation Act 1980 Tax purposes	Consult University Archivist to see whether these records are of historical interest.	CRM system	K:drive		

4.3. Media Relations

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Records of media contacts	E	When superseded	N/A	Destroy			Stored by external supplier. Not UoP records	N/A	Not published	
Press releases	E	End of academic year	20 years	Consider archiving	To provide evidence for future REF JISC recommendation Historical value	To preserve a historical record of the development of the University certain press releases will be archived (For example: opening of new buildings, major research projects). Archiving of other press releases will be at the discretion of the University Archivist	K:drive	L:drive	Published on website and issued to media	
Transcripts of media briefings and interviews	E	End of academic year	5 years	Destroy	JISC recommendation					
Monitoring and analysis of media coverage of the University	E	End of academic year	20 years	Destroy	To provide evidence for future REF JISC recommendation	Retention of the content linked from media monitoring is beyond the control of UoP, but the lists will still make a useful index of what was available and may be able to be sourced from the archive of the relevant third party, or a site such as the UK web archive.	K:drive	L:drive	Not published	

4.4. Recruitment and Outreach

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Programme of events	E	Completion of event	21 years	Delete	To tie in with HEAT reporting. Youngest child on event would be 9yrs old	For example: talks; workshops; taster days; information days; summer schools	Google Diary and Salesforce	Google Diary and Salesforce, further back on RAO database and K:drive	Not published	
Administration of events	E	Completion of event	3 year	Delete	To assist with the planning of future events		K:drive	K:drive (RAO shared drive)	Not published	
Holiday workshop attendees (Discontinued)	P/E	Date of application	2 years	Destroy	Preparation for CRM	Secondary School Children. Signed parental consent required Data also entered on HEAT (see below)	RAO paper filing & K:drive from 2015	RAO paper filing	Personal details, only if consent is given for photograph in newsletter	
Mentees (Discontinued)	P/E	Date of summer school selection form	2 years	Destroy	Preparation for CRM	Data also entered on HEAT (see below)	Google Drive	K:drive	Not published	
Summer school attendees (Discontinued)	P/E	Date of application	2 years	Destroy	Preparation for CRM	Residential attendees. Signed parental consent required Data also entered on HEAT (see below)	Locked file storage	??	Not published	
Student ambassadors & Student mentors	E	End of role	6 years*	Delete	HR Protocol	* Paperwork is disposed after 6 months	iTrent	iTrent	Not published	
Data entered into Higher Education Access Tracker (HEAT)	E	Date of birth	30 years	Delete	Data held on HEAT database until the child's 30th birthday	Database managed by PCC. Data sharing agreement is in place	HEAT Database	N/A	Not published	
Leads	E	End of year of application	2 years	Delete		The year of application can be inferred from the date of the prospectus ordered or the event attended	Salesforce		Not published	
Student Profiles	E	Expiry of consent	N/A	Delete		Consent is currently requested for 5 years				

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Photographs	P/E	Expiry of consent	N/A	Destroy		Consent is currently requested for 5 years Not to be confused with images on Marketing Portal – see 4.6 below				

4.5. Alumni Relations

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Contact and course details of individual alumni	P/E	When superseded	N/A	Destroy		NB: Alumni should be contacted periodically to update their contact details and check that they wish to continue to be contacted (last survey conducted to update details – 2015)	CRM system	Virtual Server 007	Not published	
Alumni files	E	Graduation	80 years	Destroy / Archive		Record of UoP interaction with individual alumni. Consult University Archivist to see whether these records are of historical interest.	CRM system		Not published	
Summarised / anonymised statistical data of alumni	P/E	End of academic year	10 years	Destroy	JISC recommendation		CRM system	Virtual Server 007 / K:drive / N:drive	Not published (given directly to relevant staff)	
Records concerning the administration of alumni events	P/E	Completion of event	1 year	Destroy	JISC recommendation		Eventbrite & K:drive	Eventbrite	Not published	

4.6. Publications and Promotional Work

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Records concerning the commissioning, design, editing, approval and production of publications and promotional materials	P/E	Date of publication	1 year	Destroy			K:drive	Electronic PDFs – K:drive	Not published	
Final versions	P/E	Date of publication	5 years	Destroy or Archive†	Potential historical value	NB: includes all University newsletters and magazines (except Communicator and the weekly staff email) † Archive significant publications, such as: prospectuses, catalogues for exhibitions of student work, and promotional material for major events		University Archive Electronic – K:drive & Designers’ Server (Print Services)	Produced & distributed to internal and external audience depending on the job	
Staff newsletter – weekly email	E	Date of publication	5 years	Destroy or Archive†	Potential historical value		Salesforce	n/a	Sent to all staff via email	
Staff newsletter – ‘Communicator’ (historic)	P/E	N/A	permanent	Archive	Historical value		K:drive & Designers’ Server (Print Services)	K:drive & Designers’ Server (Print Services)	Produced & distributed to internal and external audience depending on the job	
Records concerning the development and placing of advertisements	P/E	End of academic year	5 years	Delete		Largely overseen by Campaigns team in conjunction with external contractors	K:drive	K:drive	Public	
Images, videos, recordings for use in publications & promotional work	E	Expiry of consent	N/A	Delete		There are currently two consent forms. For adults, consent is requested for 7 years. For under 18s, consent is requested for 3 years.	Marketing Portal	N/A	Various	

4.6.1. Corporate Identity

RECORD CATEGORY	FORMAT	RETENTION PERIOD BEGINS	MARKETING & COMMS RETENTION PERIOD	DISPOSAL ACTION	RATIONALE	NOTES	MASTER SHOULD BE STORED IN	HISTORICAL INFO	PUBLICATION INFO	RAG STATUS
Guidelines	E	When superseded	1 year	Delete			Marketing Portal	K:drive	Published on website and in print	
Logos and templates	E	When superseded	1 year	Delete			Marketing Portal	K:drive & Designers' Server (Print Services)	Published on website	
Records concerning the development and design of logos and templates	E	When superseded	N/A	Delete			N/A	Electronic proofs on Designers' Server (Print Services)	Not published	