

HERITAGE AND INFORMATION GOVERNANCE
Records Retention Schedule for Marketing

This category covers all marketing undertaken in the institution, including: marketing of the institution as an academic institution to prospective students; marketing the institution as a prospective business partner to other institutions and to commercial organisations; marketing of specific institutional facilities or services to specific groups of prospective customers/users inside or outside the institution.

This retention schedule is based on the recommendations made by the Joint Information Systems Committee. The letter indicates the final disposition of each type of record, and applies to original records. Where copies of originals are kept locally, these can be destroyed when these are no longer required.:

A = 1 copy to be transferred to the University Archive. See Retention Schedule Guidelines for further details.

D = Destroyed.

The number following the letter code indicates the period (in years) after which records may be destroyed, and is the minimum retention period required by best practice or legislation. It assumes a new file is opened at the start of each academic, calendar and financial year, and is **always** calculated from the date of the last record in the file.

FOLDER STRUCTURE	Examples of Types of Record	Retention Period	Authority
MARKETING/STRATEGY - identifying requirements for new/revised strategy - undertaking research - developing strategy proposals - consulting on strategy proposals - reviewing and revising strategy proposals in the light of comments received - drafting strategy documents - consulting on strategy documents - reviewing draft strategy documents in the light of comments received - producing final strategy documents - submitting final strategy documents for formal endorsement - formally endorsing strategy documents - disseminating strategy documents - reviewing strategy.	Key records documenting the development and establishment of the institution's marketing strategy. Working papers documenting development and establishment of the institution's marketing strategy.	A: Superseded + 5 years Copy to the University Archive after approval for permanent retention. D: Issue of strategy + 1 year	

Records Retention Schedule for Marketing (2)

MARKETING/POLICY • identifying requirements for new/revised policy • undertaking research • developing policy proposals • consulting on policy proposals • reviewing and revising policy proposals in the light of comments received • drafting policy documents • consulting on policy documents • reviewing draft policy documents in the light of comments received • producing final policy documents • submitting final policy documents for formal approval • formally approving policy documents • disseminating policy documents • reviewing policy	Key records documenting the development and establishment of the institution's marketing policies. Working papers documenting development and establishment of the institution's marketing policies.	A: Superseded + 5 years Copy to the University Archive after approval for permanent retention. D: Issue of policy + 1 year	
MARKETING/PROCEDURES • identifying needs for new/revised procedure • undertaking research • analysing work processes • drafting procedure documents • consulting on procedure documents • reviewing draft procedure documents in the light of comments received • trialling procedure • refining procedure as a result of trials • submitting final procedure documents for formal approval • formally approving procedure documents • disseminating procedure documents • reviewing procedure.	Master copies of procedures relating to marketing. Development of the institution's procedures relating to marketing.	A: Superseded + 3 years Copy to the University Archive after approval for permanent retention. D: Issue of procedures + 1 year	

Records Retention Schedule for Marketing (3)

MARKETING/ADVERTISING Activities involved in advertising the institution's programmes, facilities and services, including: - designing advertisements - placing advertisement - monitoring the impact of advertisements.	Development, placement and impact of advertisements.	D: Current + 5 years	
MARKETING/CAMPAIGNS Activities involved in conducting marketing campaigns, including: - planning marketing campaigns - developing marketing campaigns - implementing marketing campaigns - reviewing marketing campaigns.	Design, implementation and review of marketing campaigns.	Completion of campaign + 3 years	
MARKETING/CORPORATE IDENTITY Activities involved in managing the institution's corporate identity and brands, including: - designing the institution's corporate identity marks (logos, etc.) - controlling use of corporate identity marks - compiling and ensuring use of corporate style guides.	Design of the institution's corporate identity marks (logos etc.). Development of corporate style guides for official use of corporate identity marks.	D: Superseded D: Superseded	
MARKETING/RESEARCH Activities involved in carrying out market research, including: - designing and developing market research tools - planning and conducting data collection - collecting, collating and analysing market research data.	Design and development of market research tools. Market research data: data relating to identifiable individuals. Market research data: aggregated data and analyses.	D: Completion of research + 5 years D: Completion of analysis of data D: Completion of research + 5 years	