

Records retention schedule: Research & Development

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Development

Record series	Summary retention policy
Research project files	Minimum of 7 years after closure and up to 25 years. US Federal Department requirement minimum of 12 years Principal Investigator
Research project files for European projects	Minimum of 7 years after closure and up to 25 years. Principal Investigator

Funding and administration

Record series	Summary retention policy
Individuals/companies correspondence	On-going Principal Investigator
Financial information	7 years REGS
Systems-configurations and invoices	Lifetime of systems REGS
Systems-project management and reporting material	Duration of development programme REGS

Record series	Summary retention policy
ESF, ERDF, KTP, Medici, EMDA, GOEM and EU funding	<p>10 years for ESF, ERDF, innovation and Medici fellowships.</p> <p>Up to 25 years for KTP</p> <p>Prior to the destruction of any documentation relating to projects supported by the 1994-96, 1997-99 and 2000-06 ERDF Programmes, confirmation must be sought from the Government.</p> <p>Most European projects require original documentation to be kept until at least 12 years after the end of that round of funding. For example, documentation for projects under the 2007-13 ERDF programme must be kept until at least 31 December 2025 and not disposed of until informed by the Department of Communities & Local Government (DCLG) of an actual disposal date.</p> <p>For the 2014-20 ESIF (ERDF/ESF) programme documents must be kept until the date notified by DCLG, expected to be at the earliest 31 December 2033. Failure to comply could lead to financial penalties should the documentation not be available in the event of an audit.</p> <p>REGS</p>

Intellectual Property Rights (IPR) management

Record series	Summary retention policy
Contracts and agreements (intellectual property management))	<p>Termination of contract/agreement + 20 years</p> <p>REGS</p>
Intellectual Property Rights (IPR) correspondence	<p>End of the current financial year + 6 years</p> <p>REGS</p>
Patents applications and renewals	<p>Life of patent + 6 years</p> <p>REGS</p>
Patents correspondence	<p>End of the current financial year + 6 years</p> <p>REGS</p>

Knowledge transfer and enterprise

Record series	Summary retention policy
Consultancy documentation (Research and Innovation Services)	Completion of consultancy project + 6 years REGS
Knowledge transfer partnership (KTP) programme files	Completion of programme + 6 years REGS