

15. Public Relations

Public Relations is an outward-facing function of state agencies. Agencies document activities, promote initiatives, publicize accomplishments, provide instruction, and gather feedback from constituents.

Table of contents (A comprehensive listing of all record types is available on the Functional Schedule page at <https://archives.ncdcr.gov/government/state-government-agencies/functional-schedule>):

- 15.1 [Agency Publications](#)
 - 1511 [Brochures/Pamphlets](#)
 - 1512 [Media File](#)
 - 1513 [Official Publications](#)
 - 1514 [Publications Management](#)
 - 1515 [Social Media and Websites](#)
- 15.2 [Community Relations](#)
 - 1521 [Awards](#)
 - 1522 [Constituent Comments, Complaints, and Petitions](#)
 - 1523 [Constituent Requests](#)
 - 1524 [Customer Call Center Recordings](#)
 - 1525 [External Surveys](#)
 - 1526 [Public Hearings](#)
 - 1527 [Public Records Requests](#)
- 15.3 [Development](#)
 - 1531 [Acknowledgments](#)
 - 1532 [Donor Lists](#)
 - 1533 [Fund Drive Materials](#)
- 15.4 [Marketing and Publicity](#)
 - 1541 [Advertisements](#)
 - 1542 [Audio-Visual Materials](#)
 - 1543 [Forms, Style Sheets, and Templates](#)
 - 1544 [Press Releases](#)
 - 1545 [Speeches](#)
- 15.5 [Programming and Training](#)
 - 1551 [Agendas, Exhibits, and Programs](#)
 - 1552 [Announcements](#)

1553 [Educational Materials](#)

1554 [Invitations](#)

1555 [Registration Materials](#)

1556 [Training Materials](#)

Appendix: [Records That Will Transfer to the State Records Center](#)

15

Public Relations records are best organized by record type and then chronologically within each record type. Of the record types identified for the public relations function, a number of them are iterative in nature and hold no value beyond the next successive version. These record types, such as brochures (RC No. 1511), should be destroyed in office when they are superseded or obsolete. Other record types are collected to facilitate the public relations function and have a relatively short-term administrative value. These record types, such as External Surveys (RC No. 1525), should be destroyed in office when their reference value ends. For several record types, the agency must determine which particular records have historical significance and retain these records in office permanently or transfer them to the State Archives of North Carolina, as designated in the disposition instructions; those records without historical significance will be destroyed in office. Several record types have a specified retention period, which is why it is recommended to organize these records chronologically; for instance, in January 2018, any Public Records Requests (RC No. 1527.2) that were completed in or before 2015 can be destroyed.

Due to the nature of public relations records, confidentiality generally does not attach to these records. However, be aware that constituents may include personal identifying information in complaints or service requests they submit, in which case, G.S. § 132-1.10 confers confidentiality.

These Functional Schedules apply to records in all media, unless otherwise specified. The State Archives of North Carolina recommends that agencies develop a file plan that documents the owners of record copies, internal definitions of reference value, and record formats. (A sample is available on the records management tools page at <https://archives.ncdcr.gov/government/rm-tools>.) Information about the NC Public Records Act, confidentiality, destructions, audits and litigation actions, and electronic records can be found in the overview to the functional scheduling initiative. A key for the Functional Schedule along with definitions of important records management terms can be found in the glossary to this schedule.



15.1 Agency Publications

DEFINED: Publications created at agency expense.

SEE ALSO: Directories and other compilations of resources and information are under AGENCY MANAGEMENT. Payments for agency publications are under FINANCIAL MANAGEMENT; contracts for publications are under LEGAL. The coding for websites is under INFORMATION TECHNOLOGY.

15.1

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|---|---|---|
| 1511.S | Brochures/Pamphlets Ephemeral materials produced for marketing or registration purposes; also includes annual financial summary reports solely created for public distribution (e.g., Annual Comprehensive Financial Report [ACFR]) | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1512.R | Media File Reference copies of newspaper, magazine, and other media clippings concerning the agency, agency officials, and other topics of interest | RETAIN UNTIL: Reference value ends ± THEN: Destroy Agency Policy: _____ | |
| 1513.T | Official Publications (1 of 2) Record copies of agency materials published in print or online | Transfer to State Publications Clearinghouse, State Library of North Carolina: a) <i>Publications for sale</i> : 5 copies b) <i>Free publications (printed)</i> : 2 print copies AND an electronic copy, or 10 print copies c) <i>Free publications (no print run)</i> : 1 electronic copy | <u>Authority</u> G.S. § 125-11.5 through 11.10 |
| 1513.S | Official Publications (2 of 2) Surplus copies of agency printed materials | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
 ± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|--|--|----------|
| 1514.5 | <p>Publications Management</p> <p>Correspondence and other related records regarding the design and creation of agency publications</p> <p>SEE ALSO: Contracts (LEGAL)</p> | <p>RETAIN UNTIL: Complete</p> <p>PLUS: 5 years</p> <p>THEN: Destroy*</p> | |
| 1515.A | <p>Social Media and Websites (1 of 3)</p> <p>Social media sites and other websites that have historical content or have been identified for long-term retention for the purposes of institutional memory and planning; also includes comments and private messaging</p> <p>SEE ALSO: Reference Files (AGENCY MANAGEMENT); Advertisements (below); Audio-Visual Materials (below); Press Releases (below); Announcements (below)</p> | <p>PERMANENT (appraisal required) ∞¹</p> | |
| 1515.5 | <p>Social Media and Websites (2 of 3)</p> <p>Social media sites and other websites containing routine content; also includes comments and private messaging</p> <p>SEE ALSO: Reference Files (AGENCY MANAGEMENT); Advertisements (below); Audio-Visual Materials (below); Press Releases (below); Announcements (below)</p> | <p>RETAIN UNTIL: Posted/Received</p> <p>PLUS: 5 years</p> <p>THEN: Destroy</p> | |

¹ The State Archives can review state agency websites and social media accounts to determine if they should be captured by the Archives. If they appraised as non-archival your analyst will provide guidance for self-capture. Please contact the records analyst for your agency to request an appraisal.

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
 ± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.



| RC No. | Record Types | Disposition Instructions | Citation |
|--------|---|---|----------|
| 1515.S | <p>Social Media and Websites (3 of 3)</p> <p>Other related records produced in planning and executing agency’s online presence</p> <p>SEE ALSO: Reference Files (AGENCY MANAGEMENT); Advertisements (below); Audio-Visual Materials (below); Press Releases (below); Announcements (below); Web Management and Operations Records (INFORMATION TECHNOLOGY)</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |

15.1

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
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15.2 Community Relations

DEFINED: Records produced in the course of interactions with the agency’s community.

SEE ALSO: Advertisements, Press Releases, and Speeches are under Marketing and Publicity. Reports that are aggregated from surveys are under AGENCY MANAGEMENT. Any billing statements generated for public records requests are under FINANCIAL MANAGEMENT. The records of Public Hearings that are reviewing proposed administrative rules are under GOVERNANCE; those convened by the Office of Administrative Hearings or the North Carolina Industrial Commission are under LEGAL; those related to compliance investigations are under MONITORING AND COMPLIANCE. Customer calls that convey complaints against employees should be handled according to the HUMAN RESOURCES schedule. Complaints that necessitate investigations or litigation or audits should be subsumed into the relevant records under HUMAN RESOURCES or LEGAL or MONITORING AND COMPLIANCE. Original petitions delivered to the General Assembly are under GOVERNANCE.

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|--|--|----------|
| 1521.P | Awards (1 of 2) Records concerning significant awards by the agency recognizing community contributions | PERMANENT (appraisal required) ∞ | |
| 1521.5 | Awards (2 of 2) Records concerning routine awards by the agency recognizing community contributions | RETAIN UNTIL: Complete PLUS: 5 years THEN: Destroy | |
| 1522.1 | Constituent Comments, Complaints, and Petitions Records concerning positive comments as well as objections, dissatisfaction, or disagreements with actions or positions taken or not taken by the agency; includes petitions signed by constituents requesting action SEE ALSO: Complaints (HUMAN RESOURCES); Petitions, Rule Making Proceedings (GOVERNANCE); Improper Conduct Investigations, Investigation and Hearing Records (MONITORING AND COMPLIANCE) | RETAIN UNTIL: Closed PLUS: 1 year THEN: Destroy* | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
 † The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction “destroy when reference value ends.” Please use the space provided.



| RC No. | Record Types | Disposition Instructions | Citation |
|--------|---|---|----------|
| 1523.1 | Constituent Requests Includes requests for service or information (RFI) | RETAIN UNTIL: Closed PLUS: 1 year THEN: Destroy* | |
| 1524.< | Customer Call Center Recordings Recordings of calls to customer service centers made for quality assurance and training purposes SEE ALSO: Complaints (HUMAN RESOURCES) | RETAIN UNTIL: Complete PLUS: 30 days THEN: Destroy* | |
| 1525.R | External Surveys Surveys distributed to and collected from constituents addressing agency services, policies, and other concerns SEE ALSO: Reporting (AGENCY MANAGEMENT) | RETAIN UNTIL: Reference value ends ± THEN: Destroy Agency Policy: _____ | |
| 1526.P | Public Hearings (1 of 2) Minutes and/or transcripts of hearings SEE ALSO: Agency Hearings (LEGAL), Rule Making Proceedings (GOVERNANCE) | PERMANENT | |
| 1526.1 | Public Hearings (2 of 2) Agendas, notices, speaker sign-up sheets, and other related records SEE ALSO: Agency Hearings (LEGAL), Rule Making Proceedings (GOVERNANCE) | RETAIN UNTIL: Complete PLUS: 1 year THEN: Destroy* | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.

∞ See appendix for list of item numbers for records that should transfer to the State Archives.

± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|--|--|----------|
| 1527.2 | <p>Public Records Requests</p> <p>Requests submitted by persons seeking access to agency records and documentation of agency response</p> <p><i>NOTE: These disposition instructions apply only to the request, internal agency records related to searching for and preparing responsive records, and communication of response; the documents that are responsive to public records requests should be handled according to their respective disposition instructions (e.g., speaker sign-up sheets from a public hearing can be destroyed after 1 year; publications management materials can be destroyed after 5 years). However, if the agency also retains separate copies of the documents that are responsive to public records requests, they may also be destroyed 2 years after completion of the request</i></p> <p>SEE ALSO: Accounts Receivable (FINANCIAL MANAGEMENT)</p> | <p>RETAIN UNTIL: Complete</p> <p>PLUS: 2 years</p> <p>THEN: Destroy*</p> | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.

∞ See appendix for list of item numbers for records that should transfer to the State Archives.

± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

15.3 Development
DEFINED: Records concerning agency efforts to encourage donations of materials or services in support of agency activities.
SEE ALSO: The documentation of financial contributions is under FINANCIAL MANAGEMENT.

15.3

| RC No. | Record Types | Disposition Instructions | Citation |
|---------------|--|---|----------|
| 1531.1 | Acknowledgements Copies of acknowledgements sent to donors | RETAIN UNTIL: Complete PLUS: 1 year THEN: Destroy | |
| 1532.S | Donor Lists Contact information for individuals and organizations that have expressed an interest in supporting agency activities | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1533.1 | Fund Drive Materials Records documenting the organization and promotion of fund drives and other special events in which the agency participated for the purpose of fundraising; includes records concerning solicitations requesting and donations providing money or in-kind donations for agency programs SEE ALSO: Accounts Receivable (FINANCIAL MANAGEMENT) | RETAIN UNTIL: Complete PLUS: 1 year THEN: Destroy | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
 ± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

15.4 Marketing and Publicity

DEFINED: Records concerning overall public relations of the agency.

SEE ALSO: Contact lists are under AGENCY MANAGEMENT. Recordings of governing body meetings are under GOVERNANCE. Office surveillance recordings are under RISK MANAGEMENT.

15.4

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|--|---|----------|
| 1541.P | <p>Advertisements (1 of 2)</p> <p>Print or online ads that promote agency initiatives or publicize agency activities and have historical significance</p> | PERMANENT | |
| 1541.S | <p>Advertisements (2 of 2)</p> <p>Routine print or online ads that promote agency initiatives or publicize agency activities</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |
| 1542.P | <p>Audio-Visual Materials (1 of 2)</p> <p>Images, recordings, and films produced by or for the agency that have historical significance</p> <p>SEE ALSO: Governing and Advisory Body Minutes (GOVERNANCE), Workplace Security Records (RISK MANAGEMENT)</p> | PERMANENT (appraisal required) ∞ | |
| 1542.S | <p>Audio-Visual Materials (2 of 2)</p> <p>Routine images, recordings, and films produced by or for the agency</p> <p>SEE ALSO: Governing and Advisory Body Minutes (GOVERNANCE), Workplace Security Records (RISK MANAGEMENT)</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |
| 1543.S | <p>Forms, Style Sheets, and Templates</p> <p>Blank forms, style sheets, templates, and letterhead used to establish agency branding</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.
 ∞ See appendix for list of item numbers for records that should transfer to the State Archives.
 † The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.



| RC No. | Record Types | Disposition Instructions | Citation |
|--------|--|---|----------|
| 1544.P | Press Releases (1 of 2) Press releases that have historical significance | PERMANENT (appraisal required) ∞ | |
| 1544.S | Press Releases (2 of 2) Routine press releases; includes public service announcements (PSAs) | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1545.A | Speeches (1 of 2) Historical speeches delivered by agency officials | PERMANENT (archival) ∞ | |
| 1545.R | Speeches (1 of 2) Routine speeches delivered by agency officials | RETAIN UNTIL: Reference value ends ± THEN: Destroy Agency Policy: _____ | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.

∞ See appendix for list of item numbers for records that should transfer to the State Archives.

± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

15.5 Programming and Training

DEFINED: Records concerning events and educational outreach organized by the agency.

SEE ALSO: Educational materials produced by licensed educators working within schools as well as training required for professional or recreational licenses are addressed under EDUCATION. Training provided to agency personnel is under HUMAN RELATIONS. Any financial information and payments collected from registrants are under FINANCIAL MANAGEMENT. Any release forms required to participate in agency-sponsored events are under LEGAL.

15.5

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|---|--|----------|
| 1551.P | Agendas, Exhibits, and Programs (1 of 2) Agendas, handouts, presentations, and programs produced for agency events and exhibits that have historical significance | PERMANENT (appraisal required) ∞ | |
| 1551.S | Agendas, Exhibits, and Programs (2 of 2) Routine agendas or programs produced for agency events and exhibits | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1552.S | Announcements Announcements sent concerning agency events | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1553.S | Educational Materials Materials produced for usage by teachers; includes lesson plans, activities, and other related records | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |
| 1554.P | Invitations (1 of 2) Invitations sent concerning agency events that have historical significance | PERMANENT | |
| 1554.S | Invitations (2 of 2) Routine invitations produced for agency events | RETAIN UNTIL: Superseded/Obsolete THEN: Destroy | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.

∞ See appendix for list of item numbers for records that should transfer to the State Archives.

± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.

| RC No. | Record Types | Disposition Instructions | Citation |
|--------|---|---|----------|
| 1555.S | <p>Registration Materials</p> <p>Registrations, confirmations, and other logistical materials related to agency events</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |
| 1556.S | <p>Training Materials</p> <p>Agendas, handouts, presentations, and other related records produced for agency training events for external audiences</p> <p>SEE ALSO: Coursework (EDUCATION), Employee Training Materials (HUMAN RESOURCES)</p> | <p>RETAIN UNTIL: Superseded/Obsolete</p> <p>THEN: Destroy</p> | |

* No destruction of records may take place if audits or litigation are pending or reasonably anticipated.

∞ See appendix for list of item numbers for records that should transfer to the State Archives.

± The agency shall establish and enforce internal policies setting minimum retention periods for the records that DNCR has scheduled with the disposition instruction "destroy when reference value ends." Please use the space provided.



Records That Will Transfer to the State Records Center

The RC No. listed beside each Record Type is found on the Functional Schedule; the Item Number is a tracking number that is used only for records that are stored at the State Records Center.

Appendix

An index or box inventory should accompany any records that transfer to the State Records Center for temporary storage or for eventual transfer to the custody of the Archives.

1515.A Social Media and Websites: Electronic records will transfer immediately to the custody of the Archives.

| Agency | Series Title | Item Number |
|---|--|-------------|
| Natural and Cultural Resources, Department of | State Agencies' Website Preservation (Electronic) File | 47744 |

1521.P Awards: Transfer to the State Records Center when reference value ends for immediate transfer to the custody of the Archives.

| Agency | Series Title | Item Number |
|---|--------------------------------------|-------------|
| Natural and Cultural Resources, Department of | Junior Historian Awards Day File | 23100 |
| Natural and Cultural Resources, Department of | North Carolina Awards Committee File | 766 |
| Natural and Cultural Resources, Department of | North Carolina Heritage Awards File | 42187 |

1542.P Audio-Visual Materials: Transfer to the State Records Center when reference value ends for immediate transfer to the custody of the Archives.

| Agency | Series Title | Item Number |
|---|---|-------------|
| Natural and Cultural Resources, Department of | North Carolina Symphony Photographs File | 977 |
| Natural and Cultural Resources, Department of | State Historic Sites Documentaries File | 4083 |
| Natural and Cultural Resources, Department of | State Parks Public Information Media File | 35193 |

1544.P Press Releases: Transfer to the State Records Center when reference value ends for immediate transfer to the custody of the Archives.

| Agency | Series Title | Item Number |
|--|---------------------|-------------|
| Administration, Department of | News Releases File | 136 |
| Agriculture and Consumer Services, Department of | News Releases File | 8958 |
| Environmental Quality, Department of | News Releases File | 2485 |
| Insurance, Department of | Press Releases File | 11629 |
| Public Instruction, Department of | News Releases File | 1228 |
| Public Safety, Department of | News Releases File | 9570 |

1545.A Speeches File: Transfer to the State Records Center when reference value ends for immediate transfer to the custody of the Archives.

| Agency | Series Title | Item Number |
|--|--|-------------|
| Agriculture and Consumer Services, Department of | Commissioner of Agriculture Speeches File | 37726 |
| Auditor, Office of the State | Speeches File | 9464 |
| Commerce, Department of | Secretary of Commerce Speeches File | 302 |
| Environmental Quality, Department of | Secretary of Environmental Quality Speeches File | 47654 |
| Health and Human Services, Department of | Secretary of Health and Human Services Speeches File | 1615 |
| Information Technology, Department of | State Chief Information Officer Speeches File | 47360 |
| Information Technology, Department of | Center for Geographic Information and Analysis Speeches File | 36016 |
| Insurance, Department of | Department of Insurance Speeches File | 3376 |
| Investigation, State Bureau of | State Bureau of Investigation Director Speeches File | 14020 |
| Justice, Department of | Attorney General Speeches File | 2358 |
| Labor, Department of | Commissioner of Labor Speeches File | 2445 |
| Natural and Cultural Resources, Department of | Secretary of Natural and Cultural Resources Speeches File | 759 |
| Public Instruction, Department of | State Superintendent's Speeches File | 33443 |
| Revenue, Department of | Secretary of Revenue Speeches File | 48483 |
| Secretary of State, Department of the | Speeches File | 47990 |
| Transportation, Department of | Secretary of Transportation Speeches File | 2943 |
| Treasurer, Department of State | State Treasurer Speeches File | 50831 |
| Wildlife Resources Commission, North Carolina | Executive Director Speeches File | 35977 |

Appendix

1551.P Agendas, Exhibits, and Programs: Transfer to the State Records Center when reference value ends for immediate transfer to the custody of the Archives.

| Agency | Series Title | Item Number |
|---|--|-------------|
| Information Technology, Department of | North Carolina Geographic Information System Conference File | 36012 |
| Natural and Cultural Resources, Department of | Museum of History Exhibits File | 826 |
| Natural and Cultural Resources, Department of | NCMA Exhibition File | 857 |
| Natural and Cultural Resources, Department of | NCMA Mary Duke Biddle Gallery File | 861 |
| Natural and Cultural Resources, Department of | North Carolina Natural Science Museum Exhibits File | 9205 |
| Natural and Cultural Resources, Department of | North Carolina Symphony Publicity File | 976 |
| Natural and Cultural Resources, Department of | State Capitol Events File | 49234 |