

CRAS: External Relations and Services



**University
of Manitoba**

ER-010 (Marketing and Promotional Materials)

Series consists of records relating to the design, creation and distribution of all information/promotional/marketing materials produced for or by the faculty/department/unit. Records may include promotional reports, brochures, posters, advertisements, mail-outs, website/internet-related materials, correspondence, drafts, final copies, screen shots of web/internet-related materials and supporting documentation. Records can be divided into the following sub-sets:

ER-011(Marketing Materials): Final version.

Retention: Transfer one copy of each final product to Archives.

ER-012 (Drafts): All other records:

Retention: Last Use + 3 Years: Destroy.

ER-020 (Donor and Constituent Files)*

Series consists of correspondence with donors pertaining to their donations and direct relationships with the University/faculty/department. This applies to any gift made via cash, credit, gifts of securities as well as gifts in kind including gifts of archival papers, books, specimen collections, equipment, etc. A copy of the final agreement and donor contact information should be shared with Donor Relations before finalization, and an original copy of any legal contract or deed of gift must be sent to the Office of Legal Counsel for retention. Records can be divided into the following sub-sets:

ER-021(Donor Files): Files pertaining to a relationship that has resulted in the formal transfer of gift of any sort to the University, including correspondence, appraisal and logistical information, copy of the deed of gift:

Retention: Retain active files within your office. Transfer inactive files to the Archives.

ER-022(Constituent Files): Files pertaining to a potential donor, where the final agreement has not been reached.

Retention: If an agreement is reached, handle as ER-021. In the event that the relationship becomes inactive, retain for 3 years following last contact, then destroy.

**This series is separate from the main donor files held by Donor Relations.*

ER-030 (Vendor Files)*

Series consists of current contact information, products description and delivery or maintenance schedule information from vendors used by the faculty/department/unit. This series does not include contracts or service agreements.

Retention: Termination of Relationships with the vendor + 1 year: Destroy.

**This series is separate from the main Vendor Files held by Financial Services.*

ER-040 (Publicity Files)

Series includes media releases, responses, published information from external sources (newspaper and magazine clippings, newscasts etc.) and interviews by University staff, students or affiliates pertaining to University issues.

Retention: Current Year + 4 Years: Transfer to Archives.

ER-050 (Patient Files)

Series includes medical, dental or psychological patient files, created both for staff, student and external clients of the University of Manitoba.

Retention: Termination of patient relationship + 10 years: in the event the patient is a minor, retain for 10 years after the patient reached the age of majority.