



Information, Privacy and Archives Division


Government of Ontario Function-Based Common Records Series: Public and Stakeholder Relations

December 2014

AUTHORIZATION

**Government of Ontario Function-Based Common Records Series:
Public and Stakeholder Relations (PSR)**

Approval under authority of the *Archives and Recordkeeping Act, 2006*:



James G. Hamilton, Archivist of Ontario

2014.12.17
Date:

Public And Stakeholder Relations

Function Acronym: PSR

Description

The function of engaging the public and raising and maintaining the ministry's OPS and broad public profile. Includes marketing, advertising, media relations, exhibits, education, events, presentations, and announcements. Includes relationships with business, industry, public advisory and community groups, as well as internal stakeholders. Also includes the management of customer services and feedback.

Activities Performed Under This Function

Acronym	Name
AGR	Agreements
CMM	Committees
CMP	Compliance
CUS	Customer Service
DON	Donations
ENQ	Enquiries
EVA	Evaluation
EVT	Event Management
EXH	Exhibits
FBK	Feedback
GRT	Greetings
LIA	Liaison
MKT	Marketing and Education
MED	Media Relations
PLA	Planning
PRE	Presentations
PRO	Procedures
PRU	Procurement
REP	Reporting
SUB	Submissions
VIS	Visits

For information about the function-based common records series and their use, please visit the [Function-Based Common Records Series](#) page on iNetwork.

Summary of Series

Series Number	Series Name	Retention Period	Closure Criteria	Final Disposition
Agreements (AGR)				
PSR-AGR-001	Programs	CCY + 7 years	After contract or agreement has expired, or is terminated or superseded	Transfer to Archives
PSR-AGR-002	Creative Works and Services	CCY + 7 years	After contract or agreement has expired, or is terminated or superseded	Transfer to Archives
PSR-AGR-003	Third Party French Language Services	CCY + 7 years	After agreement has expired, or is terminated or superseded	Destroy
Committees (CMM)				
PSR-CMM-001	Ministry Public and Stakeholder Relations Committees	CCY + 4 years	After actions are completed	Transfer to Archives
Compliance (CMP)				
PSR-CMP-001	OPS Service Standards	CCY + 10 years	After actions are completed	Destroy
Customer Service (CUS)				
PSR-CUS-001	French Language Services	CCY + 3 years	After actions are completed	Destroy

Series Number	Series Name	Retention Period	Closure Criteria	Final Disposition
Donations (DON)				
PSR-DON-001	Charitable Organizations	CFY + 7 years	After donation is received or finalized	Destroy
Enquiries (ENQ)				
PSR-ENQ-001	Routine Enquiries	CCY + 2 years	After enquiry is answered	Destroy
Evaluation (EVA)				
PSR-EVA-001	Ministry Service Standards	CCY + 10 years	After actions are completed	Destroy
Event Management (EVT)				
PSR-EVT-001	Planning and Coordination	CCY + 8 years	After actions are completed	Destroy
Exhibits (EXH)				
PSR-EXH-001	Exhibits and Displays	CCY + 5 years	After actions are completed	Destroy
Feedback (FBK)				
PSR-FBK-001	Complaints, Suggestions and Compliments	CCY + 2 years	After correspondence is sent	Destroy
Greetings (GRT)				
PSR-GRT-001	Greetings and Salutations	CCY + 5 years	After correspondence is sent	Destroy
Liaison (LIA)				
PSR-LIA-001	Stakeholder Affiliations	CCY + 5 years	After actions are completed	Destroy
Marketing and Education (MKT)				
PSR-MKT-001	Corporate and Editorial Services	CCY + 8 years	After actions are completed	Destroy
PSR-MKT-002	Multimedia Products	CCY + 7 years	Until end of calendar year in which product was produced	Transfer to Archives
Media Relations				

Series Number	Series Name	Retention Period	Closure Criteria	Final Disposition
(MED)				
PSR-MED-001	Media Relations Procedures	CCY + 10 years	After actions are completed	Destroy
PSR-MED-002	Media Relations Products	CCY + 10 years	After actions are completed	Transfer to Archives
PSR-MED-003	Media Enquiries	CCY + 10 years	After actions are completed	Transfer to Archives
Planning (PLA)				
PSR-PLA-001	Communications and Marketing Plans	CCY + 8 years	After plans are superseded	Transfer to Archives
Presentations (PRE)				
PSR-PRE-001	Events	CCY + 5 years	After actions are completed	Destroy
Procedures (PRO)				
PSR-PRO-001	Operating Procedures	CCY + 5 years	After procedures are superseded	Destroy
Procurement (PRU)				
PSR-PRU-001	Creative Works and Services	CFY + 7 years	After expiration of contract	Destroy
Reporting (REP)				
PSR-REP-001	Programs and Services	CCY + 7 years	After actions are completed	Destroy
PSR-REP-002	Issues	CCY + 10 years	After actions are completed	Transfer to Archives
Submissions (SUB)				
PSR-SUB-001	Nominations and Awards	CCY + 2 years	After actions are completed	Destroy
Visits (VIS)				
PSR-VIS-001	Site Visits	CCY + 5 years	After actions are completed	Destroy

Activity: Agreements (AGR)

Description: The processes associated with the establishment, negotiation, maintenance and review of agreements.

Series #: PSR-AGR-001	
Series Title: Public and Stakeholder Relations – Agreements – Programs	
Rationale for Retention Period	Replicates existing approved retention period in Series LGL-6001 (Contracts / Agreements Files) in the OPS <i>Government of Ontario Common Records Series: Legal Services</i>
Closure Criteria	After contract or agreement has expired, or is terminated or superseded
Total Retention	CCY + 7 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to prepare and/or negotiate contracts or agreements and to provide legal evidence of the terms and conditions of contracts or agreements supporting the conduct of community, public relations, marketing or public profile raising activities, e.g. agreements relating to youth and work programs.	
Contents:	
Records may include but are not limited to correspondence regarding the contents of contracts or agreements; minutes or notes of meetings with main stakeholders or parties to the agreement; drafts containing significant changes / alterations or formally circulated for comment; final approved versions of contracts and agreements; and reviews of agreements.	
Notes:	
Cross References:	

Series #: PSR-AGR-002	
Series Title: Public and Stakeholder Relations – Agreements – Creative Works and Services	
Rationale for Retention Period	Replicates existing approved retention period in Series LGL-6001 (Contracts / Agreements Files) in the OPS <i>Government of Ontario Common Records Series: Legal Services</i> and in COM-3006 (Communications Contract Files) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After contract or agreement has expired, or is terminated or superseded
Total Retention	CCY + 7 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to prepare and/or negotiate contracts and to provide legal evidence of the terms and conditions of contracts for the services of artists, writers, editors, and other vendors to produce creative works, as well as to document the ownership of intellectual property.	
Contents:	
Records relating to the establishment, negotiation, maintenance and review of contracts for creative works and services. Includes contracts for the services of artists, writers, editors, and other vendors to produce photographs, video recordings, sound recordings, artwork, exhibits, publications, and other works.	
Records may include but are not limited to correspondence regarding the contents of contracts or agreements; minutes or notes of meetings with main stakeholders or parties to the agreement; drafts containing significant changes / alterations or formally circulated for comment; final approved versions of contracts and agreements; and reviews of agreements.	
Includes information regarding the ownership of copyright and intellectual property.	
Notes:	
Cross References:	
See Series PSR-PRU-001 (Public and Stakeholder Relations – Procurement – Creative Works and Services) for records relating to the procurement of creative works and services.	

Series #: PSR-AGR-003	
Series Title: Public and Stakeholder Relations – Agreements – Third Party French Language Services	
Rationale for Retention Period	Replicates existing approved retention period in Series LGL-6001 (Contracts / Agreements Files) in the OPS <i>Government of Ontario Common Records Series: Legal Services</i>
Closure Criteria	After agreement has expired, or is terminated or superseded
Total Retention	CCY + 7 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to prepare and/or negotiate agreements and to provide legal evidence of the terms and conditions of agreements supporting the provision of French language services to the public by a third party on behalf of a ministry or agency in accordance with the <i>French Language Services Act, 1990</i> and <i>O. Reg. 284/11</i> .	
Contents:	
Records relating to the establishment, negotiation, maintenance and review of agreements for French language services and communications.	
Records may include but are not limited to correspondence regarding the contents of contracts or agreements; minutes or notes of meetings with main stakeholders or parties to the agreement; drafts containing significant changes / alterations or formally circulated for comment; final approved versions of contracts and agreements; and reviews of agreements.	
Notes:	
Cross References:	
See Series PSR-CUS-001 (Public and Stakeholder Relations – Customer Service – French Language Services) for records relating to the ministry provision of French language services and communications.	
See Series PSR-PRU-001 (Public and Stakeholder Relations – Procurement – Creative Works and Services) for records relating to the procurement of creative works and services.	

Activity: Committees (CMM)

Description: The activities involved with managing committees including advisory committees and task forces (internal and external).

Series #: PSR-CMM-001	
Series Title: Public and Stakeholder Relations – Committees – Ministry Public and Stakeholder Relations Committees	
Rationale for Retention Period	Replicates existing approved retention period in Series GOV-7050 (Committees – Internal Administration) in the OPS <i>Common Records Series for Administrative Functions of the Government of Ontario</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 4 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to maintain a record of the key plans, deliberations, decisions, and activities of ministry committees that focus on public and stakeholder relations and customer service excellence.	
Contents:	
Records may include but are not limited to agendas, minutes of meetings, meeting information packages, briefing notes, policy papers, reports, presentations, proceedings, correspondence, and other records pertaining to the committee or group and its meetings.	
Includes the committee's establishment and dissolution, appointment of members, and terms of reference.	
May include records related to sub-committees.	
Notes:	
Cross References:	

Activity: Compliance (CMP)

Description: The activities associated with complying with mandatory or optional accountability, legal, regulatory or quality standards or requirements to which the ministry is subject. Includes compliance with legislation and with national and international standards.

Series #: PSR-CMP-001	
Series Title: Public and Stakeholder Relations – Compliance – OPS Service Standards	
Rationale for Retention Period	Replicates retention period in Series 19.4.1 (Strategic Management – Compliance) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to demonstrate ministry compliance with OPS service standards, including <i>OPS Common Service Standards, Accessibility Standards for Customer Service (O. Reg. 429/07)</i> , and <i>Communications in French Directive, May 2010</i> .	
Contents:	
Includes customer service data received and/or generated, performance measures of service quality and achievements against OPS service standards, assessments of existing levels of compliance, and records of initiatives to address or improve upon compliance.	
Includes ministry reports of performance compliance submitted annually to the Ministry of Government and Consumer Services.	
Notes:	
Cross References:	

Activity: Customer Service (CUS)

Description: The activities associated with establishing standards of customer service and administering specialized services provided to customers by the ministry.

See **Series STR-CUS-001 (Strategic Management – Customer Service - Service Charters and Standards)** for records relating to the development and review of ministry- or division-wide strategies to deliver quality services to customers or stakeholders.

Series #: PSR-CUS-001	
Series Title: Public and Stakeholder Relations – Customer Service – French Language Services	
Rationale for Retention Period	Replicates existing approved retention period in COM-5003 (French Language Service Records) in the OPS <i>Government of Ontario: Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 3 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to document ministry provision of French language services and communications according to the <i>French Language Services Act, 1990</i> and the <i>Communications in French Directive, May 2010</i> and <i>Guidelines, October 2010</i> .	
Contents:	
Records may include but are not limited to ministry requests for translation of communications and promotional materials via the Ontario Shared Services (OSS) Translation Tracking System (TTS) and related correspondence.	
Also includes records relating to the administration of French language services by third parties on behalf of ministries and agencies.	
Notes:	
<u>Excludes:</u> Documents submitted for translation.	
Cross References:	

Activity: Donations (DON)

Description: The activities associated with managing money and items donated by the ministry to charities.

Series #: PSR-DON-001	
Series Title: Public and Stakeholder Relations – Donations – Charitable Organizations	
Rationale for Retention Period	Replicates retention period in Series 2.7.2 (Community Relations – Donations) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After donation is received or finalized
Total Retention	CFY + 7 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to administer donation initiatives to charitable organizations that are formally sponsored by and affiliated with the OPS (e.g. United Way, Federated Health Charities). Also, to administer donations that are coordinated by ministry employees but that are not OPS-sponsored.	
Contents:	
Records may include but are not limited to correspondence; memos; announcements; posters; ministry appointed goals; tracking, distribution and coordination records; progress and status reports; and senior management approvals.	
Notes:	
Cross References:	

Activity: Enquiries (ENQ)

Description: The activities involved with the handling of requests for information about the ministry and its services by the general public or another organization.

Series #: PSR-ENQ-001	
Series Title: Public and Stakeholder Relations – Enquiries – Routine Enquiries	
Rationale for Retention Period	Replicates existing approved retention period in Series GOV-7400 (Routine Public Inquiries) in the OPS <i>Common Records Series for Administrative Functions of the Government of Ontario</i>
Closure Criteria	After enquiry is answered
Total Retention	CCY + 2 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to ensure consistent handling of routine enquiries when responding to the public.	
Contents:	
Records relating to requests for and the handling of enquiries regarding routine information about the ministry and its services (e.g. hours of operation, office locations).	
Records may include but are not limited to enquiries received, draft messaging, and approved responses.	
Notes:	
Cross References:	

Activity: Evaluation (EVA)

Description: The process of determining the suitability of potential or existing programs, items of equipment, systems or services in relation to meeting the needs of the given situation. Includes ongoing monitoring.

Series #: PSR-EVA-001	
Series Title: Public and Stakeholder Relations – Evaluation – Ministry Service Standards	
Rationale for Retention Period	Replicates retention period in Series 19.4.1 (Strategic Management – Compliance) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to monitor and measure performance of ministry (program-specific) service standards (best practices) consistent with legal requirements and with existing ministry or OPS standards and policies.	
Contents:	
Records may include but are not limited to customer service data received and/or generated to monitor customer satisfaction, performance measures of service quality, summaries of findings, and records of initiatives to address or improve upon performance.	
Includes program-specific performance reports and communications (both internal to the ministry and external to customers).	
Notes:	
Cross References:	
See Series STR-CUS-001 (Strategic Management – Customer Service - Service Charters and Standards) for records relating to the development and review of ministry- or division-wide strategies to deliver quality services to customers or stakeholders.	

Activity: Event Management (EVT)

Description: The activities involved with organizing / arranging and managing an official or formal event, celebration, social occasion, or ceremony conducted by the ministry to enhance its internal and external relationships or to promote its services and programs (e.g. open houses, information sessions, and ground breaking ceremonies).

Series #: PSR-EVT-001	
Series Title: Public and Stakeholder Relations – Event Management – Planning and Coordination	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-3 (Public Events Records) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 8 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to plan and coordinate ministry-hosted events (celebrations, ceremonies, functions) and to develop information for use by ministry representatives at significant occasions or public events internal and external to the OPS.	
Contents:	
Records may include but are not limited to event plans, event budgets, schedules of events, itineraries, researched information, audience profiles, and briefing and background materials.	
Includes speaker confirmations, guest lists, invitations and acceptances, registration forms received, thank you letters, and related correspondence.	
Includes speeches, speaking notes, presentations (addresses), news releases, media kits, informational literature, promotional materials developed and published.	
Includes catering arrangements, venue bookings, organization of entertainment, accommodation and transportation arrangements, staging and facilitation arrangements, and related correspondence.	
Also includes event debriefs and reports.	

Notes:

Events include celebrations, ceremonies, functions, exhibit launches, and conferences or seminars arranged for the general public, government organizations or external stakeholders / customers of the ministry.

Excludes: Primary copy of the Minister's speaking notes and other records related to engagements attended by the Minister or the Minister's representative. Where these are held for the Minister in the communications branch, use Series MIN-100 (Ministers' Subject Files) in the OPS *Government of Ontario Common Records Series: Ministers' Public Records*.

Cross References:

See Series PSR-PRS-001 (Public and Stakeholder Relations – Presentations – Events) for presentations delivered by ministry representatives at public events.

See Series PSR-VIS-001 (Public and Stakeholder Relations – Visits – Site Visits) for records related to coordinating site visits.

See Series STR-PRS-001 (Strategic Management – Presentations – Events) for presentations, addresses, speeches, or papers delivered by the Deputy Minister / Assistant Deputy Minister / Director at significant occasions or public events.

See Series MIN-100 (Ministers' Subject Files) in the OPS *Government of Ontario Common Records Series: Ministers' Public Records* for the primary copy of the Minister's speaking notes and other records related to engagements attended by the Minister or the Minister's representative, where these notes and records are held for the Minister in the communications branch.

Activity: Exhibits (EXH)

Description: The activities associated with using organizational material in mounted displays for the purpose of informing or educating the viewer, or promoting the activities, services, projects, or programs of the ministry.

Series #: PSR-EXH-001	
Series Title: Public and Stakeholder Relations – Exhibits – Exhibits and Displays	
Rationale for Retention Period	Replicates retention period in Series 2.10.1 (Community Relations – Exhibitions) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 5 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to promote or raise awareness of the ministry or of particular services or programs. Also, to administer the ministry’s participation in or mounting of exhibits and displays.	
Contents:	
Records may include but are not limited to background research; copies of documents, information or research used as part of the exhibit; exhibit summaries and designs; and complementary exhibit material (e.g. catalogues).	
Also includes records relating to arrangements, approvals, itineraries, and related correspondence.	
Notes:	
Exhibits and display materials may be created by ministry staff or by vendors under contract to the ministry. (See Cross References)	
Cross References:	
See Series PSR-AGR-002 (Public and Stakeholder Relations – Agreements – Creative Works and Services) for records relating to the establishment, negotiation, maintenance and review of contracts for creative works and services including documentation of copyright ownership.	
See Series PSR-MKT-001 (Public and Stakeholder Relations – Marketing and Education – Multimedia Products) for records relating to the design and development of creative materials used in exhibits or displays.	

Activity: Feedback (FBK)

Description: The process of handling public reaction and feedback about a ministry's policies or services. Includes opinions, suggestions, complaints, congratulations or appreciation received from the public.

Series #: PSR-FBK-001	
Series Title: Public and Stakeholder Relations – Feedback – Complaints, Suggestions and Compliments	
Rationale for Retention Period	Replicates retention period in Series 2.19.2 (Community Relations – Public Reaction) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After correspondence is sent
Total Retention	CCY + 2 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to document, manage and respond to public and stakeholder compliments and positive feedback. Also, to document, manage and responde to public and stakeholder concerns that may relate to ministry policies, programs and services and that may require investigation or a specific formal response.	
Contents:	
Records may include but are not limited to compliments, suggestions or complaints received, draft and approved responses, researched information, issues notes, briefing materials and notes, alerts, and related correspondence.	
Notes:	
Cross References:	
See Series PSR-REP-002 (Public and Stakeholder Relations – Reporting – Issues Reports) for records relating to issues mangement concerning ministry policies, programs and services.	

Activity: Greetings (GRT)

Description: The activities associated with preparing and sending messages of appreciation, congratulations, and condolence. Includes holiday greetings.

Series #: PSR-GRT-001	
Series Title: Public and Stakeholder Relations – Greetings – Greetings and Salutations	
Rationale for Retention Period	Replicates existing approved retention period in Series DMO-3001 (Deputy Ministers' Correspondence) in the OPS <i>Government of Ontario Common Records Series: Deputy Ministers' Offices</i>
Closure Criteria	After correspondence is sent
Total Retention	CCY + 5 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to document correspondence sent to the public and stakeholders.	
Contents:	
Records relating to the preparation and dispatch of letters of introduction, appreciation (e.g. years of service), congratulations (e.g. anniversaries), condolences, or holiday wishes. Includes certificates, greeting cards, and mailing lists.	
Notes:	
Cross References:	

Activity: Liason (LIA)

Description: The activities associated with maintaining regular general contact between the ministry and professional associations, professionals in related fields, private sector organizations, community groups, and other governments. Includes participation in discussion groups and sharing informal advice, membership in professional associations and collaboration on projects that are not joint ventures.

Series #: PSR-LIA-001	
Series Title: Public and Stakeholder Relations – Liaison – Stakeholder Affiliations	
Rationale for Retention Period	Replicates existing approved retention period in Series DMO-1003 (External [Other Ministries and Stakeholder] Files) in the OPS <i>Government of Ontario Common Records Series: Deputy Ministers' Offices</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 6 years
Final Disposition	Destroy
Purpose:	
<p>Information is created and/or received and used to document liaison activities with professional associations, professionals in related fields, private sector organizations, community groups, as well as other government organizations external to the OPS and that are not joint ventures. Liason activities may entail memberships, participating in or attending meetings, collaboration on projects, and the exchange of information.</p>	
Contents:	
<p>Records may include but are not limited to meeting agendas and minutes, meeting materials, reports, position papers, presentations, research proposals, reports, correspondence, and other records pertaining to the association or organization and its contacts and communications.</p> <p>Also may include records used in administering individual or ministry memberships in associations, etc. external to the government. Includes membership applications, membership fees documentation, and related correspondence.</p>	

Notes:**Cross References:**

See Series STR-JTV-001 (Strategic Management – Joint Ventures – Ministries and Stakeholders) for records relating to establishing and monitoring strategic alliances that relate to the core responsibilities of the ministry or other strategic joint venture arrangements.

See Series STR-POL-003 (Strategic Management – Policy – Policy Coordination) for records relating to liasons and relations with other policy organizations.

Activity: Marketing And Education (MKT)

Description: The process of analyzing, creating and promoting products and services. Includes market research, public education, advertising, promotion, pricing and product evaluation.

Series #: PSR-MKT-001	
Series Title: Public and Stakeholder Relations – Marketing and Education – Corporate and Editorial Services	
Rationale for Retention Period	Replicates existing approved retention periods in Series COM-2001-2 (Corporate and Editorial Services) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 8 years
Final Disposition	Destroy
Purpose:	
<p>Information is created and/or received and used to provide advice, design, develop, deliver and evaluate communication products (written materials) for the ministry. Also, to prepare and distribute corporate material for OPS internal and external use, and writing or editorial services for the ministry.</p>	
Contents:	
<p>Records may include but are not limited to product designs, product messaging (drafts and approved versions), consultations, researched information, meeting notes and minutes, approvals, presentations, reports, business cases, and briefing notes.</p> <p>Products developed for the ministry for internal and external use include written materials such as brochures, pamphlets, newsletters, guides, business plans, annual reports and other assorted products. Also includes Minister, Deputy Ministry and Assistant Deputy Minister announcements and memoranda for internal distribution regarding administrative or routine matters.</p> <p>Includes submissions for approval to the Office of the Auditor General of Ontario (OAGO).</p>	
Notes:	

Cross References:

See Series PSR-AGR-002 (Public and Stakeholder Relations – Agreements – Creative Works and Services) for records relating to the establishment, negotiation, maintenance and review of contracts for creative works and services.

See Series PSR-PLA-001 (Public and Stakeholder Relations – Planning – Communications and Marketing Plans) for plans related to product development and distribution.

Series #: PSR-MKT-002	
Series Title: Public and Stakeholder Relations – Marketing and Education – Multimedia Products	
Rationale for Retention Period	Replicates existing approved retention periods in Series COM-3001 (Photographs), COM-3002 (Video Recordings), COM-3003 (Sound Recordings) and COM-3004 (Artwork and Posters) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	Until end of calendar year in which product was produced
Total Retention	CCY + 7 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to provide advice, design, develop, deliver and evaluate communication products (multimedia materials) for the ministry. Also, to disseminate information to the public and to promote ministry programs or services being delivered or to provide general information or updates.	
Contents:	
Records may include but are not limited to multimedia materials produced by the ministry, by the ministry communications branch, or by contracted vendors or suppliers:	
<ul style="list-style-type: none"> • Photographs: Photographs of the Minister, Deputy Minister, other ministry officials, ministry employees, ministry events, sites, facilities, and other subjects related to ministry programs and activities. Includes analog and digital formats. • Video recordings: Includes recordings of ministry television programming, advertisements, public service announcements, events and subjects related to ministry programs and activities. May also include authorized copies of television interviews and news stories involving the Minister, Deputy Minister, or ministry staff. Includes analog and digital recordings. Includes stock footage, video masters, and video segments. • Sound recordings: Includes recordings of ministry radio programming, advertisements, public service announcements, events and subjects related to ministry programs and activities. May also include authorized copies of interviews and news stories involving the Minister, Deputy Minister, or ministry staff. Includes various formats, such as audiotape cassettes, reel-to-reel tapes, and digital recordings. 	

Includes audio masters and audio segments.

- **Original artwork and posters**

Notes:

Cross References:

See Series PSR-AGR-002 (Public and Stakeholder Relations – Agreements – Creative Works and Services) for records relating to the establishment, negotiation, maintenance and review of contracts for creative works and services, including the documentation of the ownership of intellectual property.

See Series PSR-PLA-001 (Public and Stakeholder Relations – Planning – Communications and Marketing Plans) for plans related to product development or distribution.

Activity: Media Relations (MED)

Description: The activities associated with establishing a relationship between the media and the ministry. Includes cultivating media contacts, coordinating access to the media, authorizing and issuing press releases and briefings, and organizing media interviews.

Series #: PSR-MED-001	
Series Title: Public and Stakeholder Relations – Media Relations – Media Relations Procedures	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-5 (Media Relations Products) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to manage contact with the media, to support ministry employees in providing information to the media, and to assist in responding to media enquiries.	
Contents:	
Records may include but are not limited to strategic media planning records, policy documents regarding media relations, records used to train and advise ministry employees in dealing with the media, approvals for ministry communication products, media or Member of Provincial Parliament (MPP) or Member of Parliament (MP) contact reports, correspondence, and other material.	
Notes:	
Cross References:	

Series #: PSR-MED-002	
Series Title: Public and Stakeholder Relations – Media Relations – Media Relations Products	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-5 (Media Relations Products) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to manage contact with the media, to support ministry employees in providing information to the media, and to assist in responding to media enquiries.	
Contents:	
Records may include but are not limited to news releases, fact sheets, backgrounders, staff Q&A (question and answer) sheets, media advisories, memos, summaries and synopses of media scans, and other communications products developed by the communications branch or ministry for the release of information to the media.	
Notes:	
Cross References:	

Series #: PSR-MED-003	
Series Title: Public and Stakeholder Relations – Media Relations – Media Enquiries	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-5 (Media Relations Products) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received to document interactions with the media and any messaging used when responding to media enquiries.	
Contents:	
Records may include but are not limited to media enquiry, alerts, messaging and responses, approvals, correspondence, House book or House notes, issues notes, legal advice, and other records created or received when responding to a media enquiry.	
Notes:	
Cross References:	
See Series PSR-REP-002 (Public and Stakeholder Relations – Reporting – Issues Reports) for records used to monitor and analyse media reports, legislation, stakeholder activities and public concerns regarding the ministry’s policies, programs and services.	

Activity: Planning (PLA)

Description: The process of formulating ways in which objectives are determined and can be achieved. Includes determination of services, needs and solutions to those needs.

Series #: PSR-PLA-001	
Series Title: Public and Stakeholder Relations – Planning – Communications and Marketing Plans	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-1 (Communication Planning Records) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After plans are superseded
Total Retention	CCY + 8 years
Final Disposition	Transfer to Archives
Purpose:	
Information is created and/or received and used to provide advice and to develop, deliver, and evaluate communications and marketing plans, and to provide a strategic direction on producing and disseminating products and announcements to the public and stakeholders, by and on behalf of ministries.	
Contents:	
Records may include but are not limited to the development and review of communications or marketing plans including final approved versions of plans and draft versions of plans containing significant changes / alterations or formally circulated for comment.	
Includes background (market) research, notes of meetings or reports analysing issues and the outcomes of consultation, briefing notes, business cases, presentations, market research, marketing strategies, correspondence, and other records that pertain to the communication and marketing of ministry initiatives and objectives.	
Notes:	
Cross References:	

Activity: Presentations (PRE)

Description: The activities involved with giving presentations for professional, community relations or promotional purposes.

Series #: PSR-PRE-001	
Series Title: Public and Stakeholder Relations – Presentations – Events	
Rationale for Retention Period	Replicates existing approved retention period in Series DMO-3003 (Engagements and Public Events Records) in the OPS <i>Government of Ontario Common Records Series: Deputy Ministers’ Offices</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 5 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to document presentations delivered by ministry representatives at public events, celebrations, ceremonies, functions, or conferences, including public events held by the ministry.	
Contents:	
Records may include but are not limited to transcripts of final versions of presentations delivered by ministry representatives. Includes draft versions of presentations, background research, and audio, video or other recordings of presentations.	
Also may include invitations, notifications, and related correspondence.	
Notes:	
Presentations is used as a generic term in this series to include addresses, speeches, papers, multi-media presentations, etc.	
<u>Excludes:</u> Presentations delivered by the Deputy Minister / Assistant Deputy Minister / Director.	

Cross References:

See Series MIN-100 (Ministers' Subject Files) in the OPS *Government of Ontario Common Records Series: Ministers' Public Records* for records relating to public events attended by the minister or his or her representative.

See Series STR-PRS-001 (Strategic Management – Presentations – Events) for presentations, addresses, speeches, or papers delivered by the Deputy Minister / Assistant Deputy Minister / Director at significant occasions or public events.

Activity: Procedures (PRO)

Description: The activities involved with developing and adopting standard organizational methods of operating according to formulated policy.

Series #: PSR-PRO-001	
Series Title: Public and Stakeholder Relations – Procedures – Operating Procedures	
Rationale for Retention Period	Replicates retention period in Series 2.18.1 (Community Relations – Procedures) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After procedures are superseded
Total Retention	CCY + 5 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to develop and review ministry procedures related to ministry communications and public and stakeholder relations in accordance with OPS-service standards such as the <i>OPS Common Service Standards, Communications in French Directive, May 2010, and Accessibility for Ontarians with Disabilities Customer Service Standard.</i>	
Contents:	
Records may include but are not limited to final versions of manuals, handbooks, guidelines, etc., draft versions of procedures containing significant changes / alterations or formally circulated for comment. background research, reports analyzing issues, and the outcomes of consultation.	
Notes:	
Cross References:	

Activity: Procurement (PRU)

Description: The activities involved with planning, acquiring and managing the tendered and untendered purchases of all goods and services required to meet government needs.

Series #: PSR-PRU-001	
Series Title: Public and Stakeholder Relations – Procurement – Creative Works and Services	
Rationale for Retention Period	Replicates existing approved retention period in Series GOV-2000-10 (Tendered Purchases) in the OPS <i>Common Records Series for Administrative Functions of the Government of Ontario</i>
Closure Criteria	After expiration of contract
Total Retention	CFY + 7 years
Final Disposition	Destroy
Purpose:	
<p>Information is created and/or received and used to in the process of planning, tendering and acquiring goods or services in accordance with the <i>Management Board of Cabinet Procurement Directive, October 2012</i> and the <i>Procurement Directive on Advertising, Public and Media Relations, and Creative Communications Services, May 2014</i>.</p> <p>Goods and services may include advertising services, public and media relations services, communications consulting services, and creative services. Includes the services of artists, writers, editors, and other vendors to produce creative works.</p>	
Contents:	
<p>Records may include but are not limited to business cases, approvals to proceed, the development of advertisements (including final ads), statement of capabilities etc.</p> <p>Also includes Requests for Proposal (RFPs), Requests for Quotations (RFQs), Requests for Information (RFIs), vendors' responses, proposals, tender submissions, tender specifications, advertisements, working papers, waivers, evaluation criteria, summaries, records of the decision making process, and signed copies of the legal agreements or contracts. Also includes advice and correspondence related to the planning and tendering process.</p> <p>Also may include debriefing documentation, post-contract award notifications, and post-</p>	

delivery evaluations of vendor performance, monthly invoices, as well as records dealing with unsuccessful bids.

Notes:

Cross References:

Activity: Reporting (REP)

Description: The processes associated with initiating or providing a formal response to a situation or request (either internal, external or as a requirement of corporate policies), and providing formal statements or findings of the results of the examination or investigation.

Series #: PSR REP-001	
Series Title: Public and Stakeholder Relations – Reporting – Programs and Services	
Rationale for Retention Period	Replicates retention period in Series 2.20.1 (Community Relations – Reporting) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 7 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received and used to report on and monitor public and stakeholder relations and customer service programs and services.	
Contents:	
Records relating to ministry reports (e.g. correspondence reports) regarding public and stakeholder relations and customer service programs and services.	
Records may include but are not limited to background research (e.g. surveys of customers, statistics), draft versions of reports containing significant changes / alterations or formally circulated for comment, and final approved versions of reports.	
Notes:	
Cross References:	

Series #: PSR-REP-002	
Series Title: Public and Stakeholder Relations – Reporting – Issues	
Rationale for Retention Period	Replicates existing approved retention period in Series COM-2001-4 (Issues Management Records) in the OPS <i>Government of Ontario Common Records Series: Communications Services</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 10 years
Final Disposition	Transfer to Archives
Purpose:	
<p>Information is created and/or received and used to report on how issues are being handled, managed and tracked over time, and to coordinate issues management activities across the ministry.</p> <p>Information is also created and/or received and used to prepare information for use by the Minister in the Legislature; inform and advise the Premier, Minister, Deputy Minister, and senior management; and to liase with Cabinet Office Corporate Communications.</p> <p>Information is also created and/or received and used to monitor and analyse media reports, legislation, stakeholder activities, and public concerns that may relate to the ministry’s policies, programs and services.</p>	
Contents:	
<p>Records may include but are not limited to briefing materials, House book or House notes, contentious issues notes, minister’s statements, alerts, issues forecasts, and other communications products used to support the ministry in managing emerging or contentious issues.</p> <p>Includes correspondence, memoranda, notes and minutes of meetings, researched information, comments and reviews of briefing materials from ministry program areas and other ministries, and other information used to identify issues and develop and evaluate issues management products.</p>	
Notes:	
<p>Certain records in this series may be duplicated in the Minister’s House notes and other legislative activity records held by the Minister’s Office. (See Cross References)</p>	

Cross References:

See Series MIN-100 (Ministers' Subject Files) in the OPS *Government of Ontario Common Records Series: Ministers' Public Records* for Minister's copies of House notes and other legislative activity records held by the Minister's Office.

See Series STR-ADV-002 (Strategic Management – Advice – Projects and Issues) for records used to advise and support the Deputy Minister / Assistant Deputy Minister / Director on emerging, contentious or important issues for the ministry / division.

Activity: Submissions (SUB)

Description: The activities involved with preparation and submission of a formal document (e.g. report, statistics) supporting a case or opinion held by the ministry the purpose of either gain or support.

Series #: PSR-SUB-001	
Series Title: Public and Stakeholder Relations – Submissions – Nominations and Awards	
Rationale for Retention Period	Replicates retention period in Series 2.22.1 (Community Relations – Submissions) in the New South Wales <i>General Retention and Disposal Authority: Administrative Records</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 2 years
Final Disposition	Destroy
Purpose:	
Information is created and/or received to document the ministry’s pursuit and receipt of community, public relations or customer service related nominations, honours and awards, internal and external to the ministry and the OPS. Also, to document ministry participation in the nomination of a stakeholder or member of the public.	
Contents:	
Records may include but are not limited to submissions of applications or nominations, request letters, reference letters, and certificates of honours or awards. Also includes related correspondence concerning nominations, awards and presentation ceremonies.	
Notes:	
Cross References:	

Activity: Visits (VIS)

Description: The activities involved in arranging visits by the public, stakeholders, customers, students, employees and others to the ministry, with a view to inform, educate or promote the services, operation and role of the ministry. Includes arranging visits by ministry employees to other ministries or organizations.

Series #: PSR-VIS-001	
Series Title: Public and Stakeholder Relations – Visits – Site Visits	
Rationale for Retention Period	Replicates existing approved retention period in Series DMO-3003 (Engagements and Public Events Records) in the OPS <i>Government of Ontario Common Records Series: Deputy Ministers' Offices</i>
Closure Criteria	After actions are completed
Total Retention	CCY + 5 years
Final Disposition	Destroy
Purpose:	
<p>Information is created and/or received and used to coordinate and document visits to and tours of the ministry by members of the general public, stakeholders, students, customers, professional associations, community groups, OPS employees or others. Includes visits made by ministry representatives to other ministries or to organizations external to the OPS with the view of promoting the image or services of the ministry.</p>	
Contents:	
<p>Records may include but are not limited to invitations; agendas, itineraries and programs; records relating to accommodation, transport arrangements and security arrangements; maps; background notes, recommendations and briefing notes; biographies; event and tour notes; and presentations.</p> <p>Includes letters of appreciation, visit reports, and summary records regarding visitor attendance.</p>	
Notes:	
<p><u>Excludes:</u> Presentations delivered by the Deputy Minister / Assistant Deputy Minister / Director.</p>	

Excludes: Visits of officials and other delegations that require the participation of the Deputy Minister / Assistant Deputy Minister / Director.

Cross References:

See Series MIN-100 (Ministers' Subject Files) in the OPS *Government of Ontario Common Records Series: Ministers' Public Records* for records relating to public events attended by the minister or his or her representative.

See Series PSR-PRS-001 (Public and Stakeholder Relations – Presentations – Events) for presentations delivered by ministry representatives at events.

See Series STR-PRS-001 (Strategic Management – Presentations – Events) for presentations, addresses, speeches or papers delivered by the Deputy Minister / Assistant Deputy Minister / Director at significant occasions or public events.

See Series STR-VIS-001 (Strategic Management – Visits – Visiting Officials and Delegations) for records relating to the visits of officials and other delegations that require the participation of the Deputy Minister / Assistant Deputy Minister / Director.