

<b>Document</b>	<b>Document Owner</b>
Association Minutes	Secretary
Board Minutes (approved) *	Secretary
Exec Cmt Minutes	Secretary
Treasurer's Annual report *	Treasurer
Newsletter	News Editor
News articles (Pres)	News Editor
Event Slides	Program Chair
UMRA history documentation	Historian
Annual list of PDGR Grants*	PDGR Chair
Bylaws	President
Personnel --	Incoming President
Operating Manual --	Outgoing & incoming President
Organizational Tree Doc --	
MOU	President
UMRA monthly speakers since 2004	Program Chair
UMRA workshops since 2006	Program subchair Workshop
UMRA officers since 1992	Incoming President
UMRA board members since 1993	Incoming President
Board packets (sent by Pres)/agenda	President
Annual reports from officers, committees, liasons, reps (except as listed above)	All key positions
Membership directory	Membership
Retreat Report	Incoming President
Survey Results/Summaries	Surveyor
Other such as Town Hall notes	TBA
Toolkits	All key positions
UMRA Policies	Secretary/Pres
Format template (date, author, etc.)	Secretary/Pres
President's papers	President

<b>The below are all pages on the web</b>	
Home Rotator texts	News Editor/Webmaster
Home-->About	President
Home-->Umra Fact Sheet	Kris Mortensen
Home-->About Website	Webmaster
Home-->Members by Location	Will Craig
Events intro text boxes	eponymous groups
Events-->Monthly Programs:slides	News Editor
Events-->Monthly Programs:calendar	program committee
Events-->Monthly Programs:summaries	News Editor
Events-->Interest Groups:text	eponymous groups
Events-->Social Activities:text	Social Activities
Events-->Travel Tours:text	Travel Tours
Member Benefits	Membership committee
Member Benefits-->Join Renew	RSVP person/webmaster
Member Benefits-->Discounts	Membership committee
Member Benefits-->Resources	Cares Committee
ServingU: texts	eponymous groups
Newsletters/From the President	News Editor/President
Governance	docs as ABOVE
Governance-->Committees	eponymous groups

<b>Document Created schedule</b>	<b>Document Update schedule</b>	<b>Document Access</b>	<b>Document SOURCE</b>	<b>New to Web</b>
Annually	No	Public	no updates	
Monthly	No	Public	no updates	
Monthly	No	Private	no updates	x
Annually	No	Public	no updates	
Monthly	No	Public	no updates	
Monthly	No	Public	no updates	
Monthly	No	Public	no updates	
As needed	As needed	Public	Web	
Annually	No	Public	no updates	
Once	When Amended	Public	Web	
Annually	Annually	Public	Web	
Once	Review for Update	Public	Web	
Once	Review for Update	Public	Web	
Once	When Amended	Public	Web	
Once	Annually	Public	Web	
Once	Annually	Public	Web	
Once	Annually	Public	Web	
Once	Annually	Public	Web	
Monthly	No	Public	no updates	x
Annually	No	Public	no updates	x
Bi-annually	Bi-annually	Members only	no updates	x
Bi-annually	No	Public	no updates	x
As needed	No	Public	no updates	x
As needed	As needed	As needed	As needed	x
Ongoing	Review for Update	Public	Web/other	x
As needed	No	Public	Web	x
As needed	No	Public	Web	x
Annually	No	Private	no updates	x

----	----	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
Monthly	----	Public	no updates	
----	As needed	Public	Web	
Monthly	----	Public	no updates	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
----	Annually	Public	Web	
Monthly	----	Public	no updates	
----	Annually	Public	Web	
----	Annually	Public	Web	



webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
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webmaster		President	Communications Committee	
webmaster		President	Communications Committee	
webmaster		President	Communications Committee	

**Web pages updated from this document**

../grants-retirees/pdg-awards

../governance; ../governance/committees; <https://retirees.umn.edu/leadership>

../events/monthlymtg may need updating

../events/monthlymtg may need updating



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News articles (Pres)	News Editor
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Annual list of PDGR Grants*	PDGR Chair
Board packets (sent by Pres)/agenda	President
Membership directory	Membership
UMRA Policies	Secretary/Pres
Format template (date, author, etc.)	Secretary/Pres
President's papers	President
Other such as Town Hall notes	TBA
Home Rotator texts	News Editor/Webmaster
Events-->Monthly Programs:slides	News Editor
Newsletters/From the President	News Editor/President
Governance	docs as ABOVE
Add archives	
Events-->Monthly Programs:summaries	News Editor
<b>Document</b>	<b>Document Owner</b>
Treasurer's Annual report	Treasurer
UMRA history documentation	Historian
Bylaws	President
Operating Manual --	Outgoing & incoming Presidents
Organizational Tree Doc --	
MOU	President
Personnel --	Incoming President
UMRA monthly speakers since 2004	Program Chair
UMRA workshops since 2006	Cares Chair
UMRA officers since 1992	Incoming President
UMRA board members since 1993	Incoming President

Retreat Report	Outgoing President
Survey Results/Summaries	Surveyor
<b>The below are all pages on the web</b>	
Home-->About	President
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Events intro text boxes	eponymous groups
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Member Benefits	Membership committee
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Member Benefits-->Discounts	Membership committee
Member Benefits-->Resources	Cares Committee
ServingU: texts	eponymous groups
Governance-->Committees	eponymous groups
Annual reports from officers, committees, liasons, reps (except as listed above)	officer, committee chair, liason, rep
Toolkits	Committee Chair

<b>Document Created schedule</b>	<b>Document Update schedule</b>	
Annually	No	
Monthly	No	
Annually	No	
Bill Donahue	No	
Bi-annually	Bi-annually	
As needed	No	
As needed	No	
Annually	No	
As needed	As needed	
Monthly	Annually	
Monthly	----	
Monthly	----	
----	Annually	
Monthly	----	
<b>Document Created schedule</b>	<b>Document Update schedule</b>	
Greg Hestness		
Gloria Williams	As needed	
Bill Donohue	When Amended	
Frank, Bill	Review for Update	
Gerald Rinehart	Review for Update	
Bill Donohue	When Amended	
Frank Cerra	Annually	
Frank Cerra	Annually	
Ron Anderson	Annually	
Frank Cerra	Annually	
Frank Cerra	Annually	

Bill Donohue		
Will Craig		
Bill Donohue	Annually	
Kris Mortensen	Annually	
Cathy Lee Gierke	Annually	
Will Craig	Annually	
@@@@@	Annually	
Ron Anderson		
'@@@@@	Annually	
Cherie Hamilton	Annually	
Lynn Anderson	Annually	
John Anderson	Annually	
Cathy Lee Gierke	Annually	
John Anderson	Annually	
Ron Anderson	Annually	
'@@@@@	Annually	
'@@@@@	Annually	
'@@@@@	Gloria asked for these, already	
'@@@@@	Review for Update	

<b>Document</b>	<b>Document Owner</b>	<b>Document Created schedule</b>	<b>New to Web</b>
Annual reports from officers, committees, liasons, reps	officer, committee chair, liason, rep	Annually	x
Retreat Report	Outgoing President	Bi-annually	x
Survey Results/Summaries	Surveyor	As needed	x
Other such as Town Hall notes	TBA	As needed	x
Toolkits	Committee Chair	Ongoing	x
President's papers (paper OK)	President	Annually	x

<b>Web doc coordinator</b>	<b>Archival doc coordinator</b>
***	Historian
***	Historian
not on web?	Historian

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Association Minutes	Secretary
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Treasurer's reports	Treasurer
Newsletter	Newsletter Editor
News articles (Pres)	Newsletter Editor
Event Slides	Program Chair
UMRA history	Historian
PDGR Grants	PDGR Chair
Bylaws	President
Personnel	Incoming President
Operating Manual	Outgoing & incoming Presidents
Organizational Doc	
MOU	President
UMRA monthly speakers since 2004	Program Chair
UMRA workshops since 2006	Cares Chair
UMRA officers since 1992	Incoming President
UMRA board members since 1993	Incoming President
Board packets (as sent by Pres)	President
Annual reports from officers, commit	officer, committee chair, liason, rep
Membership directory	Membership
Retreat Report	Outgoing President
Survey Results	Surveyor
Other such as Town Hall notes	TBA
Toolkits	Committee Chair
UMRA Policies	Secretary/Pres
Format template (date, author, etc.)	Secretary/Pres

<b>Document Created schedule</b>	<b>Document Update schedule</b>	<b>Document Access</b>	<b>Document SOURCE</b>
Annually	No	Public	no updates
Monthly	No	Public	no updates
Monthly	No	Private	no updates
Annually	No	Public	no updates
Monthly	No	Public	no updates
Monthly	No	Public	no updates
Monthly	No	Public	no updates
as needed	as needed	Public	Web
Annually	No	Public	no updates
Once	When Amended	Public	Web
Annually	Annual Update	Public	Web
Once	Review for Update	Public	Web
Once	Review for Update	Public	Web
Once	When Amended	Public	Web
Once	Annual Update	Public	Web
Once	Annual Update	Public	Web
Once	Annual Update	Public	Web
Once	Annual Update	Public	Web
Monthly	No	Public	no updates
Annually	No	Public	no updates
bi-annually	Bi-annual Update	Members only	no updates
bi-annually	No	Public	no updates
as needed	No	Public	no updates
as needed	as needed	as needed	as needed
ongoing	Review for Update	Public	Web/other
as needed	No	Public	Web
as needed	No	Public	Web

<b>Access Level</b>
Public
Members Only
Private
<b>SOURCE</b>
Website
Other
<b>New to Web</b>
<b>Process Role</b>
Document Owner
Web Document Coordinator (Archive doc coordinator will need to identified, separately)
Process Sponsor
Institutional Process Owner
<b>Created Schedule</b>
<b>Updated Schedule</b>

**who can access these documents?**

Everyone can see it. Stored on a normal web page

Member Directories; must log in to retirees.umn.edu to access (linked from website)

Exec Committee only (are there other private groups that need their own storage areas?0

**indicates if the source doc for updates is the website or Other; most docs should be a website source**

Most documents should use the website copy as the source documents for updates [option 2 in the Continuity Doc from 5/11 meeting]

In special cases, or for committee guides and toolkits, the document source may reside on a personal individual computer hard drive [option 3 or 4 in the Continuity Doc from 5/11 meeting]

**These docs will need to be created or collected before they can be uploaded to the web (as part of summer update cycle?) since they either do not exist, or are not centrally located, currently.**

**Role description**

This is the person who will be responsible to review and/or update the document during the annual update cycle.

Collects documents to be stored on the web from the appropriate owners; and manages the annual update cycle, distributing links to documents making sure documents are properly editable, making the correct originals are used, and uploading documents to the web.

The President will back the Coordinator if needed to encourage document updates

Communication committee is process owner for

**How often a document is created, as distinct from updated**

**How often a document needs updating during the summer update cycle**





ignore the grey areas -- Ca

**Public Interest level**

Public-current

Public-old

Public-historical

Public-0

Committee-current

Committee-old

Secured

**Current or Old Public Inte**

**List Name**

**Web Doc**

**Archival Doc**

**Update Category**

Completed

Cumulative

Revised

**On a website, info is stored by level of public interest and .... This allows categories, but flexibility for building the structure.**

Recent Minutres; Recent Treas Report; Recent Operations documents; policies  
Last yrs Minutres; old Treas Report; old Operations documents;  
History of UMRA; historical lists of officers, board, speakers and workshops  
Annual Report; Retreat Summary; Survey Summaries; other??  
Current years: Position guides; toolkits; committee documentation  
Past years: Position guides; toolkits; committee documentation  
special location with security (see Access Level column)

There are two of these columns because some documents have a current version, and an older versions that we preserve. Current and old are often stored in different locations, so I need both designations to identify two different locations

**The name of the list that holds these documents on the web**

**Is this a document that gets updated by the Web update cycle?**

**Is this a document that gets collected for the Archival process?**

**From Memory-Continuity document**

documents are normally final and not to be revised in the future.

documents are revised periodically by adding material but without changing existing content.

documents that go through successive annual revisions, or editions, whether involving minor changes or substantial overhaul



Current (2019-2020) roles:

President/outgoing president: Bill Donohue

President Elect/incoming president: Frank Cerra

Historian: Gloria Williams

Webmaster: Cathy Gierke

Do we need a different document for the library archive u


<b>Topic</b>
Document organization
Update Cycle timeframe
Update Cycle timeframe
Update Cycle timeframe
Document Coordinators
SOURCE
Notification to Owners of update cycle
master documents (web originals)
updateing/editing PDFs
duplicate confusion
Google Docs & team edits
Sponsor
Institutional Process Owner
Regular Web Review
Document Archiving to lirbrary
adding new documents to the web docs
Google Search
web storage
web storage
web storage
web storage

## The following are the main process points guiding the document update process

- Documents will be stored on the website, organized in a set structure;
  - **Updates to the web will be done over the summer months (June - Sept), to be completed by**
  - If updates are needed outside of the summer update process, the owner can coordinate with
  - If an update to a document is requested by someone other than the document owner, the we and approve of the update.
  - Update process for WebDocuments, which happens over the summer, will be coordinated by
  - All documents, unless an exception is noted for SOURCE in this Excel sheet, will be updated from the summer update.
  - Document owners will be notified by the coordinator of the start of the summer update, and c
  - Master documents that are publicly accessible should be stored as PDFs for reliable reproduct
  - Multiple options exist for editing PDF documents, or for converting documents from PDF to ar documents (\$69). (Free converters were not reliable across documents.)
  - Having multiple copies of the same document can cause confusion about which is the master
  - Google Docs can be used for team updating of documents. Google Docs is available to anyone from multiple editors and avoid multiple copies of a document being emailed around for updates. comments, for a streamlined experience
  - For all web document updates, the President is the Sponsor who can be called upon to encour
  - For all web document updates, the Communication Committee is the Institutional Process Ow own the hard copy archival process?
  - Communications Committee is oversight of the Web and Newsletter; as such, someone from t where a higher authority is required to decide on changes that may be needed, the responsible Co
  - Process for Archiving documents through UMN archives is TBD, and related, but separate
  - Remember to add it to this Doc Owners list, too.
  - put simple explanation at the top of the Archive pages on how to do Google search
- Annual Reports will have it's own section in the Archive to keep them together
- Each committee/officer/position will have it's own section in the archive
- After collecting all pertinent documents, Historian can indicate which should be printed for UMN a
- Additional documents besides Annual Reports and Toolkits can be sent for important committee w



<b>initial contactee</b>	<b>Decider</b>
	President/President Elect
	President/President Elect
Cathy	President/President Elect
Cathy	President/President Elect
Program committee	President/President Elect
	President/President Elect
	President/President Elect
Cathy/Gloria	
Cathy	
Cathy/Chip	

## Decisions or tasks TBD related to the document update and storage process

Empty cells in sheet1 need to be filled in (Archive coordinator = Gloria Williams??); cells in yellow

Keyword search should also be a part of the storage/retrieval system; how do we familiarize our o

Someone needs to design/approve the Document formatting template: date, target audience, auth

format template should also include the ACCESS level (public, members only, private (to whom) re  
public

How do we get slides from the speaker? The program committee has to ask about posting them to

We will have a secure area for documents from the Exec committee. Are there other groups that n

We'll need to collect initial versions of documents, for example: annual reports; committee guides  
people understand. Introducing a new policy of document collection is something else and will an

Cathy would like to see us do a test using Google Docs for the editing and updating of documents t  
conversion between PDF to GoogleDocs is not a problem. It would give some members a taste of  
support this?

Depending on final list of documents, the structure of document storage can be laid out on new ar

Archival document update process, for library hard copy, is a separate process managed by a differ

We'll want to do a review to see if there are other documents than those listed here that we want

What items need to be collected for the Archive process? Same

familiarize leadership with key GCSE (Google Custom Search Engine) tricks (commands) -- put cmd

How to organize the documents we want to store? Some in multiple places?





## The following are the main questions regarding the document archive process

What documents does Archive process need to store?

Paper vs Digital -- is it an either/or options? Which are collected as paper vs digital?

Does the archival library have the capacity to capture websites for storage? How are they accessed if so? Is it some

How are electronic documents stored? Retrieved? If I want a document, how do I go about getting it? Can I look

talk to the archivist to get thoughts on paper use, folders, other general ground rules

Rebecca is our contact

Erik is director

First, let me review what the old (perhaps current) way has been. (From Gloria)

Prior to the monthly Board meeting, each member receives on-line the minutes of the prior meeting, the agenda, and take the to the meeting with me (after reviewing and writing questions on a separate sheet of paper. (At the meeting, the agenda is followed, and any discussion is included in the minutes for that specific meeting (the

Once the year comes to an end and I begin organizing documents for transfer to the archives, making up folders for each. I then read all documents and may correct for spelling. I also check to see that monthly reports have my clean copies of materials received for each meeting, and will use those if necessary for the "gap" reports. I have nagged through the summer, and when the new year (September) begins I stop. I am then ready to

To find a document, see the UMN library index, It gives a box number. Then you can look it up in the box. Be sure

Historian gets everything

Once we see someone is not turning in a report, then we should ask the president to help with nagging.



<b>One time Content -- no updates needed</b>				
Newsletter				
Letter from the President				
Upcoming forum				
Upcoming workshop				
[Month] Forum, At A Glance				
Past program summaries				
Past workshop summaries				
Past event slides				
News articles				
- HELLO				
- Firsthand				
- PDGR				
- Volunteer				
- Book notes				
- more				
Events				
- Armchair Traveler				
- Book Club				
- Photo Club				
- FLG				
- Travel Committee				
- Social Committee				
- more				
Home page rotators				
- From the president				
- Photo Club is on Shutterfly				

