

# Records Management Guide

University of Minnesota Retirees Association records,  
ua00251



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Resources for records management and preparing files for transfer to the University of Minnesota Archives for preservation in the [University of Minnesota Retirees Association records](#), ua00251.

## University Archives Collecting Guidelines

The University of Minnesota Archives is the official records repository of the University of Minnesota, Twin Cities with a mandated responsibility by the Board of Regents to preserve the "historically valuable documentation of University units and individuals."<sup>1</sup>

This document outlines the types of records associated with organizations affiliated with the University that fall within the collecting guidelines and provides general recommendations based on University policy and best practices for records retention<sup>2</sup>. Please contact Rebecca Toov, Collections Archivist, at [wils0952@umn.edu](mailto:wils0952@umn.edu) with questions and for clarification before destroying or removing records.

## University of Minnesota Retirees Association Collection

### University of Minnesota Affiliation

The University of Minnesota Retirees Association (UMRA) was founded by a group of retired faculty members in 1976. UMRA supports the interests of UMN retirees and provides opportunities to learn, serve, and connect. UMRA seeks to benefit members, the University, and the community through an array of informational, social, travel, volunteer, and support activities. For a complete history and supplementary documentation, consult the UMRA website: <https://umra.umn.edu/umra-history>

The UMRA archives provide a historical record of UMRA activities to support organizational continuity and memory.<sup>3</sup>

### Provenance

The UMRA archival collection was established in 1988 by an unknown deposit of materials. A summary of all documented file transfers and donations are included in an Appendix at the end of this guide.

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<sup>1</sup> [Board of Regents Policy, rev. March 2006](#)

<sup>2</sup> [Managing University Records and Information](#) (Official University policy on managing University records); [Records Retention Schedule](#) (Resource that lists different types of records commonly created by University entities with guidance for length of retention.)

<sup>3</sup> Julia Wallace, UMRA Archivist, 2024

## Material Types & Retention Recommendations

The types of materials listed in the following section represent records that are commonly associated with affiliated organizations and/or are present in the existing collection.

### Administrative Files

Records related to the administration of the **UMN Retirees Association** that may include the following:

- Articles of incorporation, constitution, by-laws, mission statements
- Meeting minutes, agendas, and notices
- Membership documents (rosters, officer lists, directories, biographies)
- Committee files
- Policy and procedure documents
- Correspondence
- Annual Reports
- Financial records, budgets, treasurer's reports (summary reports and appendices)
- Fundraising (annual/quarterly summaries, description of activities)
- Event and Program materials (planning documents, outlines, schedules, invitations, etc. for conferences, symposiums, programs, speakers, workshops, and other events)
- Historical summaries/narratives
- Project files
- Publications (newsletters, promotional materials - brochures, fliers, etc.)
- Presidential documents and files
- Operating manuals
- Toolkits
- Memorandums of Understanding (MOUs) with other organizations
- Professional development grants for Retirees

### Audio Visual Materials

Physical audio, film, and video, in all formats (cassette tapes, film reels, VHS tapes) and digital files (mp3, wav, mov) that document the activities of the organization. Please make best efforts to identify the materials with dates, names, or captions, if known.

### Photographic Materials

Print photographs, negatives, slides, and photo albums/scrapbooks and/or digital images (jpeg, tiff) that document the activities of the organization. Please make best efforts to identify the photographic materials with dates, names, or captions, if known.

### Publications

Print or digital materials produced by the organization such as newsletters, handbooks, published reports, and promotional materials (pamphlets, fliers, invitations, brochures).

### Floppy disks and Optical media discs

Materials include floppy disks/diskettes, and optical media discs (CD, DVD). Please make best efforts to identify materials with dates, titles, or captions, if known.

### 3-Dimensional Objects

These materials include plaques, awards, certificates (in frames), banners, memorabilia, garments, keepsakes or other objects. Please provide a list or general description (with images if possible) of these materials for review prior to transfer. Acceptance of three dimensional objects will be determined based on uniqueness, size, storage requirements, and other factors.

### Other

Please provide a list and/or description as well as the extent of any material types not listed above.

## Preparing Files for Transfer to University Archives

### Physical Records

Place all materials in containers with lids. Common containers include paper boxes, record (Bankers) boxes, or plastic tubs. Container lids should fit snugly on top of the boxes. This helps to protect the contents while the materials are being physically moved.

If transferring contents of a filing cabinet to boxes, please remove hanging files if possible.

Label the boxes with the name of the organization, and number each box, e.g. Box 1 of 2; Box 2 of 2, etc.

To arrange for a transfer of materials to University Archives, email Rebecca Toov, Collections Archivist at [wils0952@umn.edu](mailto:wils0952@umn.edu) with a brief description of the materials that includes the name of the organization, summary and date range of the contents, and the total number of boxes.

Physical records can be transferred to University Archives by drop-off or pick-up.

- **Donor Drop-off at Elmer L. Andersen Library**
  - Contact Rebecca Toov at [wils0952@umn.edu](mailto:wils0952@umn.edu) to arrange a date and time to drop-off records by vehicle at the ground level north entrance to [Elmer L. Andersen Library](#). Rebecca will meet the donor at their vehicle with a cart to receive the materials.
  - If you are coming to Andersen Library through campus and only have a small amount of materials that can be carried in a bag or by a cart or hand truck, please also arrange a date and time so that staff can meet you in the building to receive the materials.
- **Pick-up Request**
  - Contact Rebecca Toov at [wils0952@umn.edu](mailto:wils0952@umn.edu) to request a pick-up at the location where the records are stored on campus, or off-campus at a private home or office in the Twin Cities metro area.
  - Please include the type and number of boxes, address, location where the boxes are stored, and specific details related to building access, wayfinding, and parking, in order to determine the type of vehicle needed to facilitate transport and other logistics.

## Electronic Records

Electronic files in a variety of formats can be shared with University Archives staff in multiple ways.

- A small number of files can be sent as email attachments. Email files to Rebecca Toov, Collections Archivist, at [wils0952@umn.edu](mailto:wils0952@umn.edu)
- A larger number of files can be shared through GoogleDrive, Dropbox, or another file sharing system. Share access with Rebecca Toov, and send a notification with instructions on how to access the materials, if relevant (login details, links).
- Files can be uploaded to a thumb or flash drive, or external hard drive and delivered to University Archives. Staff will download the files from the drive to internal storage space and return the drive as applicable.

## Processing the Records

After donation, records are accessioned into the collection, prepped for archival processing, and assigned a temporary storage location, as applicable. Depending on the extent of the new accession, and staff capacity, it may take several weeks or months for the materials to be reviewed, organized, and described.

When processing is complete, the [collection guide](#) for the **University of Minnesota Retirees Association records** will be updated to reflect the new contents.

## Contact Information

### **Rebecca Toov**

Collections Archivist

[wils0952@umn.edu](mailto:wils0952@umn.edu)

612-626-5449

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222 21st Avenue South  
Minneapolis, MN 55455<sup>4</sup>

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<sup>4</sup> This guide was originally created in 2023; revised in 2024. (RT)

## Appendix

### Summary of File Transfers & Accessions

Date	Accession Number	Description
1988	NA	Files, minutes, treasurer info (card file entry)
2000	2000-0004	University Retirees Volunteer Program files transferred by Marion Watson related to historical background of program, correspondence, and volunteer opportunities, circa 1985-1995 (card file entry)
2001	2001-0006	University Retirees Volunteer Program files transferred by Dan Bryan. Contents included meeting minutes, budget reports, finances (card file entry).
2009	2009-0042	Three (3) boxes transferred by John and Judy Howe containing newsletters, meeting minutes, treasurer's reports, papers of past presidents, circa 1970s - 2000s.
2014	2014-0003	Five (5) boxes transferred by Judy Howe from UMRA offices in McNamara. Presidential Papers (Cal Kendall, Gerhard Weiss, Robert Holt, Warren Ibele, Gayle Graham Yates, Vern Jensen); Secretary Minutes, Treasurers Reports, and other business (2008-2009; 2009-2010; 2010-2011; 2011-2012); Professional Development and Grant Development files, 2009
2015	2015-0083	Electronic records (1145 files; 571.8 MB) transferred by Ron Anderson on CD-R to UA. Files dated bulk 2012-2013. Combined with one (1) small box delivered to UA by Judy Howe containing administrative documents, committee files, minutes, newsletters, reports, brochures, 2005-2015; bulk 2014-2015
2018	2018-0033	Folders delivered to UA by Gloria Williams. Contents included administrative documents, committee files, correspondence, minutes newsletters, reports, circa 2016-2018.
2022	2022-0037	Boxes delivered to UA by Gloria Williams. Contents included administrative documents, budgets/financial records, clippings, committee files, correspondence, reports, minutes, newsletters, personnel lists; membership directories, cassette tapes.
2024	2024-0009	Files delivered to UA by Julia Wallace in February 2024. Contents included administrative documents, committee files, correspondence, reports, minutes, newsletters, circa 2020-2023.