

## CORPORATE ARCHIVES & RECORDS

# Making Record Transfer Easy

If your office has materials that are designated “P” in the Carleton University Retention Schedule (CURS) and they have reached the end of their retention, they are ready to transfer to the Corporate Archives. If you have records not identified in CURS but that you believe to be historically significant (see page 2), the corporate archivist will assist you in determining whether or not they should be transferred. Follow the steps below to get started in sending your permanent records to the Corporate Archives.

### Step 1 - Confirm that the records should be transferred

- Consult the [Carleton University Retention Schedule](#) to check if your records are designated as permanent or AR (for archival review).
- Complete the [Transfer Records to the Archives form](#), found on the Corporate Archives website and submit it to the corporate archivist. This form must be completed before any records are transferred.
- Note that in order to complete this form you must also submit file listings for your records.
- The corporate archivist will confirm your transfer with the same form. Retain a copy of this form for your own records.

### Step 2 - Get the records ready

- Paper records must be in file folders that are clearly labelled and packed neatly in clean cubic-foot banker boxes (15” x 12” x 10”), archival quality preferred.
- Do not use hanging files for your records.
- Keep the records filed according to the order in which they were used in your office.
- If you are sending artifacts or memorabilia, contact us for any special packing requirements.
- Make sure that all files are labelled clearly and that the file listing you submitted is accurate.
- The originating office is responsible for booking and costs of the physical transportation of the records to the archives. Please do not forget to inform us once transportation has been booked.

### Step 3 – Important Notes

- Your office is responsible for any costs associated with retrieving and transporting records from third-party vendor storage.
- If your office ever needs to retrieve your records from the corporate archives, you can! Archives staff will happily retrieve any material or information you need.
- Any records transferred to the archives that are found to be not archival will either be returned to the originating office or disposed of according to the retention schedule.
- Not all records are paper! If your office has memorabilia or artifacts, photographs, audio-visual materials, and/or electronic materials, this may also be permanent archival material to transfer to the corporate archives.

## Historically significant corporate records may include (but not limited to):

- Constitutions and by-laws.
- Minutes, proceedings, transcripts and lists of officers of university bodies.
- Incoming and outgoing correspondence, emails, and memoranda that document decisions, significant changes and/or actions and/or events of the university and its population.
- Subject files concerning projects, activities, and functions of the university.
- Final reports and work materials of committees and task forces that document major decisions.
- Publications: one record copy of all programs, journals, monographs, newsletters, brochures, posters, and announcements issued by the university or its various departments (to be transferred ONLY from the creating/originating office).
- Photographs and/or audio-visual recordings of university events.

## Contact

### Carleton University Corporate Archives

[corporate.archives@carleton.ca](mailto:corporate.archives@carleton.ca)

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