



Generic Valuation Tool

Communications Services

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Generic Valuation Tool (GVT)

COMMUNICATIONS SERVICES

How to use this tool:

- This tool is designed for IM specialists to use with relevant business areas when identifying information resources of business value (IRBV) and retention specifications.
- The IRBV and retention specifications contained in this document are recommendations only and should be customized to apply in each institutional context. The complete document should be read before using any recommendations.
- **This GVT does not provide Government of Canada institutions with the authority to dispose of information.** GVTs are not Records Disposition Authorities (RDA) and do not replace the Multi-Institutional Disposition Authorities (MIDA).

Validation: The business processes and IRBV of this GVT have been validated by subject matter experts from the following departments: Natural Resources Canada, Human Resources and Skills Development Canada, Public Works and Government Services Canada, Treasury Board Secretariat, Privy Council Office, Canadian Transportation Agency, Citizenship and Immigration Canada and Infrastructure Canada.

Defining the Activity

“Communications Services” is one of the internal services identified by the Treasury Board Secretariat in the *Profile of Government of Canada Internal Services*. It is defined as “activities undertaken to ensure that Government of Canada communications are effectively managed, well-coordinated and responsive to the diverse information needs of the public. The communications management function ensures that the public...receives government information, and that the views and concerns of the public are taken into account in the planning, management and evaluation of policies, programs, services and initiatives.”¹

The communications function in the Government of Canada is prescribed by numerous policies, guidelines and standards. These include: *Communications Policy of the Government of Canada* (2012), *Policy on Access to Information* (2008), *Federal Identity Program Policy* (1990), *Standard on Web Accessibility* (2011), *Standard on Web Interoperability* (2012), *Standard on Web Usability* (2011), *Guideline for External Use of Web 2.0* (2011) and *Communications Policy of the Government of Canada: Procedures* (2008).

¹ *Profile of Government of Canada (GC) Internal Services*, TBS, 2012, <http://publiservice.tbs-sct.gc.ca/mrrs-sgr/about-apropos/instructions-consignes/profil-eng.asp> If the hyperlink does not work, please contact im-gi@tbs-sct.gc.ca to request a copy of the document.

The communications function has links to all of the other activities of a government department. The user of this GVT should determine if the content is being created and captured elsewhere in another function or if the content has been created specifically for the purpose of promotion and communication.

Relationship to Other GVTs

Business processes and activities often overlap. When the IRBV from an activity is identified in another GVT, there is a note in the table of IRBV and retention recommendations (below) to direct the user to the proper tool.

Acquisitions GVT: Many business processes in the communications activity are contracted out to private companies, whether it is the design of a print advertisement or the creation of a video for YouTube. Whenever a third-party contract is used, the *Acquisitions GVT* should be consulted for the IRBV related to the contracting process.

Information Technology GVT and Information Management GVT: Communications Services is closely intertwined with information technology and information management, and the associated business processes are interdependent. For example, responsibilities for web content are shared by the Information Technology (IT), Information Management (IM) and Communications sections. Some departments may define the distinctions between these functions differently. For example, the removal of obsolete material on the web may rest with any of these sections, depending on the department. This GVT has attempted to define the scope of these activities based on TBS guidelines, policies and definitions. Departments should use the three GVTs together to ensure the identification of IRBV from all the business processes.

Management and Oversight GVT: The process of creating departmental policies for any communication activities is identified in the *Management and Oversight GVT*.

Several other GVTs point to the business processes for public consultation covered in this Communications Services GVT. In particular, public consultation is often required for the creation or modification of policies, programs, services and regulations (*Legal Services GVT*), the granting of a licence (*Authorization GVT*), the granting of funds for a project (*Transfer Payments GVT*) and the modification or disposal of Crown lands (*Real Property GVT*).

Business Processes

Note: The first eight business processes described below align with the Treasury Board Secretariat (TBS) Profile of Internal Services service groupings for Communications Services²

² *Profile of Government of Canada (GC) Internal Services*, TBS, 2012, <http://publiservice.tbs-sct.gc.ca/mrrs-sgrr/about-apropos/instructions-consignes/profil-eng.asp> If the hyperlink does not work, please contact im-gi@tbs-sct.gc.ca to request a copy of the document.

and with the Information Management Common Core internal services classification structure.³ However, to include all the common activities of the communications function, this GVT has expanded on those TBS service groupings and describes a further seven activities. These were determined through a review of the *Communications Policy of the Government of Canada* and its associated procedures and guidelines, as well as a review of relevant legislation, consultations with departments and a review of existing business process analyses.

1. Public opinion research:

Public opinion research (POR) is used by the Government of Canada to conduct a broad range of activities, including policy research, market research program evaluation, client satisfaction and product development, and most frequently, to measure the effectiveness of communications and advertising. Resulting from the Commission of Inquiry into the Sponsorship Program and Advertising Activities, the *Federal Accountability Act* (2006) and the Independent Review of Public Opinion Research (2007), the rules and regulations governing POR were further strengthened. The process of POR involves many players: departments coordinate their public opinion surveys with the Public Opinion Research Directorate at PWGSC and the Privy Council Office, often contracting out the research process to private companies and providing the results to Library and Archives Canada, Parliament and the Canadian public. Nearly all the IRBV created through contracting will be identified in the Acquisitions GVT. However, there are further IRBV created in POR as a result of the strict oversight that necessitates reporting to and having approval from Ministers or their equivalents, Public Works, and the Privy Council Office. After the results of POR are reported and used to contribute to decision making, the raw data may be maintained in a database for future projects. Institutions need to determine the appropriate retention for data based on this projected need.

2. Corporate identity:

The *Federal Identity Program (FIP) Policy* outlines the specific requirements for the use of logos and titles, the presentation of bilingual items, etc., in departments' communications materials. These strict requirements are usually implemented by a FIP coordinator. This section of the GVT addresses the activities of ensuring and monitoring compliance with the Policy. Some departments with high public profiles, such as the RCMP or Coast Guard, design corporate identities in addition to the national government identity outlined by the FIP. Treasury Board must approve any corporate image design as well as any exemptions from using the images of the Federal Identity Program.

3. Consultations:

The *Communications Policy of the Government of Canada* requires departments to consult the public and to listen to and take account of people's interests and concerns when establishing priorities, developing policies, and planning programs and services. Moreover, the Government of Canada recently committed to the Open Government Initiative. Therefore, the Government of Canada engages stakeholders, citizens and experts in various ways to develop more informed and effective policies, programs, services and regulations.

The range of types of public consultation is wide, from the more passive public feedback through a comments box on a website, to actively involving citizens in the decision-making

³ Information Management Common Core Internal Services Classification Structure, 2013, [http://www.gcpedia.gc.ca/wiki/Information_Management_Common_Core_\(IMCC\)_to_Support_EDRMS_Implementation](http://www.gcpedia.gc.ca/wiki/Information_Management_Common_Core_(IMCC)_to_Support_EDRMS_Implementation). If the hyperlink does not work, please contact im-gi@tbs-sct.gc.ca to request a copy of the document.

process through hearings. The methods of consultation may include public meetings, advisory committees, stakeholder groups and voluntary associations.

Also addressed in this GVT are the consultations with Aboriginal groups that fulfill the Crown's Duty to Consult as outlined in *Aboriginal Consultation and Accommodation: Updated Guidelines for Federal Officials to Fulfill the Duty to Consult*.⁴

Departments should assess which business processes and IRBV are appropriate to their particular form of public consultation.

4. Media relations:

Providing information to the media is closely related to providing information to the public, since the public is the ultimate consumer. The activities for managing media relations include the identification, training and performance of spokespeople, managing requests from the media, the provision of information to the media, and daily media monitoring. A media monitoring service can be internal, through a third-party provider or through PWGSC. News coverage about the department or Minister would have business value; general headlines of the day, provided for convenience and not directly related to the department, would be transitory.

5. Advertising, fairs, exhibits:

The need for accountability in Government of Canada advertising has increased since the Auditor General's report of 2003. That report led to the Commission of Inquiry into the Sponsorship Program and Advertising Activities and recommendations for improved oversight in the government's advertising contracts. As a result, the business processes and information resources created through advertising are quite prescribed. The IRBV created when contracting out activities to a private company—which is the case for advertising—are identified in the Acquisitions GVT. However, there are further IRBV created in advertising as a result of the strict oversight that necessitates reporting to and having approval from Public Works, the Privy Council Office and TBS.

Departments work closely with PWGSC when advertising. When PWGSC is the lead, this GVT assumes that the department will be creating "shadow" files to document the process and to allow for the re-creation of all actions undertaken during the advertising activities for purposes of accountability. These files may contain a mix of original information resources or working copies.

The IRBV described as "final copy of advertising regardless of format" include print, audio and video promotional material that is intended for social media channels of communication such as YouTube.

The "Fairs and Exhibits" requirement has been rescinded in the Communications Policy, and the Government of Canada Exhibitions Program has been discontinued. However, the activity of communicating with the public through fairs and exhibits still occurs but is now managed by individual departments. This activity does not include exhibits of historical or cultural significance.

6. In-person service, telephone, fax, mail, and internet:

Government departments interact with and provide service to the public through a variety of channels. The IRBV identified in this business process are those created through liaison

⁴ *Aboriginal Consultation and Accommodation: Updated Guidelines for Federal Officials to Fulfill the Duty to Consult*, 2010, http://www.aadnc-aandc.gc.ca/DAM/DAM-INTER-HQ/STAGING/texte-text/intgui_1100100014665_eng.pdf

services and, for the communications function, would be predominantly a query-and-response service. Responding to complaints would also be included in this activity. For departments that fulfill their mandated functions through public service (such as the Canada Revenue Agency's providing tax filing online), those functions would be part of the operational business processes and not a function of this GVT.

7. Translation services:

Since the provision of all government communications in both official languages is a requirement of the *Communications Policy of the Government of Canada*, translation services is a busy activity that produces a lot of information resources. However, it is important to bear in mind that the documents being translated and their translated versions would have business value within the creating function. It is the creating area that would use, corporately file and retain these information resources. Translation services might maintain copies for reference or for entering into a translation database such as MultiTrans, but they are convenience copies and are therefore transitory.

8. Publications:

Broadly, the activities for publication are planning, production and dissemination. Depending on the information resource, and the needs of the institution, "production" can include both the creation of the content and the physical creation of the final product. Much of the activity surrounding government publications is addressed in other GVTs or in other areas of this GVT. For example, the contracting out of any portion of the publishing process, such as the writing, design or printing, would be part of the procurement process in the Acquisitions GVT. Ensuring that publications adhere to standards of the Federal Identity Program is under "corporate identity" in this GVT.

"Publications" include traditional paper-based publications as well as those created specifically for a digital environment.

9. Prepare and implement communications plans and strategies:

This section includes the activities of high-level planning for developing departmental communications plans, including emergency communications and risk communications plans.

10. Provide communications support to the Minister, senior management and business areas:

Communications staff support the Minister, senior management and business areas with the provision of advice on communications plans and activities. Communications staff also create speeches and other communication information resources. It is important to distinguish between the roles of the Minister: when the Minister gives a speech as spokesman for the department (as defined by the Communications Policy), it is written by departmental staff and filed in the corporate repository; political speeches are written by the Minister's office, not by departmental communications staff, and are not filed corporately.

11. Provide editing services:

This activity consists of receiving information resources from business areas, editing them, and returning the revised versions to the creating areas. Often, a copy of the revised version is maintained by the editing staff. However, these revised copies, maintained after they have been edited and returned, are only convenience copies and are therefore transitory. It is the creating area that would use, corporately file and retain these as information resources of business value. The IRBV identified in the chart below for the editing activity are the procedures or guides

being created by the editing staff and the statistical data for tracking and reporting on the work being done.

12. Collaborate with other government institutions:

Many government initiatives are done in cooperation with other government or private institutions. This section focusses on the IRBV created when coordinating the communication/promotion of these activities to the public.

13. Manage marketing events:

This activity includes outreach activities both with the public and other departments/levels of government such as sessions with consumers and hosting symposiums, conferences, presentations and discussions. The IRBV include the planning and evaluation documents rather than the content.

14. Communicate with the public through a departmental website:

One of the key ways an institution communicates with the public is through its outward-facing web pages. A website is a format of communication; most information posted on a website will be a copy of content created and maintained elsewhere. However, the website itself has business value as it is a composite of copies of IRBV from various business processes and original content. Also included in this GVT are the processes and IRBV for the management of the website and compliance with government standards for language, accessibility, usability and interoperability.

Activities of web services can overlap with information management and information technology activities. Each department needs to identify where these activities are taking place.

Departments can use their websites both for providing information and for receiving comments or queries from the public. The website can be used to gather feedback in the process of formal public consultations; this is described in this GVT under the activity “Consultations” (3.3). The role of the website in providing the public with answers to questions or requests is described in this GVT under the activity “provide service to the public (in-person, telephone, fax, mail, internet)” (3.6).

The government also provides information to the public on social media platforms such as Twitter, Facebook and YouTube. The *Directive on Recordkeeping* states that information resources of business value must be managed regardless of medium. The *Guideline for External Use of Web 2.0*⁵ states that social media messages will have business value only if:

- the information being disseminated is not a copy of information captured elsewhere and
- it documents decisions or decision-making processes, or
- it is information received from the public in response to a government request for information.

Information on a social media platform that is considered to have business value needs to be captured and maintained in a corporate repository. Departments will need to assess their social media sites for IRBV based on the purpose and content of the site.

Personal information captured in web analytics must be destroyed after 18 months as per the *TBS Standard on Privacy and Web Analytics* (2013) and with the use of LAC’s Multi-Institutional

⁵ *Guideline for External Use of Web 2.0*, TBS, 2011.

Disposition Authority 2013/001. Web analytics retained longer than 18 months must be anonymized.

15. Manage internal communications:

Internal communications in Government of Canada institutions are to be two-way, both informing employees and receiving their opinions and feedback. Internal communications may include “a mix of published materials (in multiple formats), oral presentations, staff meetings and learning events.”⁶ Internal communications include managing an institution’s intranet content. All internal communications are subject to the requirements in the *Official Languages Act* and *Federal Identity Program Policy*.

Retention

Recommended retention specifications in GVTs are determined based on traditional or best practices, a review of government-wide legislation and policy, and validation with subject matter experts. Retention periods are suggestions only; departments must take into account their own legislative requirements and business needs.

Communications policies, plans and products are intricately linked to the needs and agenda of the government in office. As a practice, staff members continually refer to previous communications products to ensure consistency in messaging for a government. As a result, the trigger for the commencement of the retention period is often the change in governing political party.

Retention is also linked to whether or not the communication refers to a strategic or important issue and therefore content and context must be taken into consideration when setting retention schedules.

Retention for content on the web: Since most web content is a copy of information resources created and maintained elsewhere, content does not have to stay on the website beyond the retention period of the original information resource. Departments must be vigilant to identify which is the official copy of the information resource and ensure that it has been captured in the corporate repository, and to capture any information of business value placed on the web that does not have another format off-line.

A recommended retention period for advertising information resources is 6 years, based on the fact that there are financial records associated with an advertising campaign. In practice, advertising information resources are likely to be maintained much longer as they will be referred to in future advertising campaigns. Since that timing cannot be predicted, only an absolute minimum retention period recommendation is provided.

⁶ *Communications Policy of the Government of Canada*, 2012, <http://www.tbs-sct.gc.ca/pol/doc-eng.aspx?id=12316§ion=text>

Business Value and Retention Recommendations

1. Public opinion research

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
<p>Management of departmental POR Create annual plan Consult with Privy Council Office (PCO) Gain approval of Minister Gain approval of Public Opinion Research Directorate (PORD) at Public Works and Government Services Canada (PWGSC) as needed Submit copies of the approved annual plan to PCO, PORD</p>	<p><i>(Throughout all processes, discussions and decisions made orally must be documented by note to file.)</i></p> <p>Annual plan Updates to annual plan Ministerial approval of annual plan Correspondence with PCO and PORD for unanticipated POR when related to the decision-making process</p>	<p>10 years after superseded</p>
<p>Plan POR projects Define need for POR and determine if project will be contracted or non-contracted Consult with PORD and Communications Procurement Directorate (CPD) at PWGSC Consult with Privy Council Office Gain approval from Minister's office and senior management</p>	<p>Correspondence with PCO and PORD Approved POR project proposal Approved POR project plan</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p>
<p>Create project templates</p>	<p>Approved project templates</p>	<p>5 years after superseded</p>
<p>Contract POR services</p>	<p>Key communications with PORD Registration number of project</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied</p>

Consult with PORD and Communications Procurement Directorate (CPD) at PWGSC Inform PORD and CPD of any changes to scope of work	<i>For remaining IRBV surrounding the procurement process please see the Acquisitions GVT</i>	to IRBV pertaining to financial transactions
Conduct research	<p>Authorization from PWGSC</p> <p>Correspondence with PORD and CPD regarding changes in work requirements</p> <p>Research instruments (e.g., questionnaires, screeners and discussion guides)</p> <p>Draft research instruments (that highlight key changes)</p> <p>Analysis plan</p> <p>Survey data</p> <p>Data tables</p> <p>Contracted deliverables – field data or report from contracted company</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p> <p>(Raw survey data is often retained longer.)</p>
Report results	<p>Final report (including certification from supplier's senior officer)</p> <p>English and French executive summaries</p> <p>Correspondence with LAC showing fulfillment of reporting obligations</p>	10 years after last administrative use

2. Corporate identity

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
<p>Make decisions about presenting communications material in compliance with <i>Federal Identity Program (FIP) Policy</i></p> <p>Request exemptions from using FIP from TB</p>	<p>Minutes from meetings with FIP manager / business areas / communications</p> <p>Documentation providing advice</p>	2 years after superseded

	Correspondence with TBS Minutes from consultations with TBS	
Request approval for a corporate logo/image from Treasury Board (TB)	Design brief Implementation plan Correspondence with TBS Minutes from consultations with TBS <i>Please see the Treasury Board Submissions GVT for IRBV related to submissions to Treasury Board</i>	5 years after superseded
Monitor compliance with FIP in communications products and activities	Progress reports Trend data	2 years after last administrative use

3. Consultations

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Prepare for consultation	Consultation plan	Same retention as for the project for which consultation was sought
Give notice of consultation	Notices of public consultation: In Canada Gazette On departmental and Consulting with Canadians websites Newspaper, television, etc. Background information on initiative	Same retention as for the project for which consultation was sought
Receive feedback	Submissions from public (emails, correspondence)	Same retention as for the project for which consultation was sought

Hold consultation session	<p>Consultation material</p> <p>Minutes, reports, summaries from consultation session</p> <p>Public comments, transcripts, letters</p>	Same retention as for the project for which consultation was sought
Report on results	<p>Summaries, reports</p> <p>Results published on departmental and Consulting with Canadians websites</p>	Same retention as for the project for which consultation was sought

3a. Consultations (Duty to Consult)

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Develop departmental approach to Duty to Consult	Procedures/policy	5 years after superseded
<p>Identify need for consultation</p> <p>Describe Crown conduct</p> <p>Identify government departments and other stakeholders involved</p> <p>Assess impact</p> <p>Identify Aboriginal groups affected</p> <p>Make initial decision whether a consultation is needed</p>	<p>Project description</p> <p>Assessment of impact</p> <p>Review of other current assessments (e.g., environmental assessment)</p> <p>Minutes, correspondence with AANDC, and/or other government departments</p> <p>Minutes, correspondence with Aboriginal groups</p> <p>Documentation about Aboriginal rights / background information about the Aboriginal groups affected</p> <p>Strength of claim assessment</p> <p>Legal counsel</p> <p>Document of decision</p> <p>Communication of decision (correspondence, notice)</p>	Same retention as for the project for which consultation was sought

<p>Plan consultation Coordinate with AANDC, other departments and other stakeholders (such as Aboriginal groups, provincial or territorial governments, and third parties)</p>	<p>Agendas, minutes Presentations Reports MOUs or other consultation agreements Consultation plan Notification of available funding (<i>IRBV created in providing funding opportunities are found in the Transfer Payments GVT</i>)</p>	<p>Same retention as for the project for which consultation was sought</p>
<p>Hold consultation Notify Aboriginal groups</p>	<p>Notification documentation (correspondence or other means) Documentation that records interaction with Aboriginal groups (letters, email messages, notes on telephone calls) Documentation that records coordination with other stakeholders Agendas, minutes Presentations by participants Reports from participants Transcripts of hearings Feedback from Aboriginal groups Departmental responses to requests/concerns from Aboriginal groups Issues management tracking table</p>	<p>Same retention as for the project for which consultation was sought</p>
<p>Report on consultation</p>	<p>Reports, summaries</p>	<p>Same retention as for the project for which consultation was sought</p>
<p>Communicate decision</p>	<p>Communications with Aboriginal groups (letters, email messages, notes on telephone calls) Summaries, news releases</p>	<p>Same retention as for the project for which consultation was sought</p>

4. Media relations

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Coordination of media relations - planning	Media relations plan	10 years after superseded
Coordination of media relations	Correspondence with journalists	2 years after last administrative use
Coordination of spokespeople	List of spokespeople Summary of requirements for spokespeople Summaries of / strategies for potential issues to be addressed Recording of the spokesperson's interview with the media Annual report on performance of spokespeople	2 years after last administrative use or after superseded
Manage media requests	Requests from media Consultation correspondence with Minister's office Response Spreadsheet of media requests Summary of / report on media requests	10 years after creation or aligned with retention period for other IRBV of the event or program to which the communication information resource relates
Provide information to the media	Press releases Backgrounders / fact sheets Technical briefings Audio-visual presentations Recordings of press conferences, interviews Questions and answers	10 years after creation or aligned with retention period for other IRBV of the event or program to which the communication information resource relates

Manage events and announcements Coordination with Minister's office and/or Privy Council	Announcements Correspondence	10 years after creation or aligned with retention period for other IRBV of the event or program to which the communication information resource relates
Media monitoring	Summaries of media monitoring (including social media) Copies of written, sound or video recordings from media	2 years after last administrative use
Answer requests for copies of press statements (transcripts, sound recordings, etc.)	Response to requests (email)	2 years after last administrative use

5. (a) Advertising

Throughout the advertising process: For IRBV related to any contracting of services, please refer to the Acquisitions GVT.

Throughout all processes, discussions and decisions made orally must be documented by note to file.

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Planning and approval Develop ad campaign Submit campaign proposal (to PCO) Submit Memorandum to Cabinet (when applicable) Submit Treasury Board Submission for approval (when required)	Meeting minutes Advertising or social marketing plan which includes: Communications objectives Key themes and messages Target audiences Public environmental analysis Proposed tactics and timetable Research Evaluation methods Project work plan Project budget Final documents that show:	6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions

	<p>Senior management approval of plan Privy Council Office approval of campaign funding Cabinet approval of campaign (for those part of the GC Annual Advertising Plan or included in a program Memorandum to Cabinet) and Treasury Board approval of campaign funding</p> <p><i>Note: For IRBV related to submissions to Treasury Board, please refer to the Treasury Board Submissions GVT</i></p>	
<p>Contract advertising services</p>	<p>Record of advice provided by PWGSC’s Advertising Coordination and Partnerships Directorate (ACPD) on the development of the Statement of Work</p> <p>Reports, minutes of meetings, correspondence, etc., that describe work progress or that address quality of the services/deliverables received</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p>
<p>Advertising production</p> <p>Work with agency to develop strategy, design and creative materials</p> <p>Inform ACPD of changes to Statement of Work</p> <p>Inform ACPD about creative product</p> <p>Manage and approve agency work</p>	<p>Briefing to advertising agency</p> <p>Advertising agency creative brief</p> <p>Creative concepts, including rough layouts/storyboards, scripts and mock-ups</p> <p>Revised concepts or scripts, if required</p> <p>Media plan/strategy and supporting rationale</p> <p>Marketing plans</p> <p>Client contact reports (obtained from advertising agency)</p> <p>Memoranda to and from the advertising agency approving concepts/scripts/details</p> <p>Approved estimates and approved amendments of estimates of production costs</p> <p>Production schedule</p> <p>Subcontractors’ bids, if applicable</p> <p>Production approvals from institution, regional offices</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p>

	<p>Privy Council Office advice</p> <p>Supplier time sheets</p> <p>Copyright clearances and releases (talent, music, photos, graphics, etc.)</p> <p>Advertising agency invoices and supporting receipts (including <i>Financial Administration Act</i> section 34 sign-off)</p>	
<p>Pre-testing</p>	<p>Note to file that pre-testing was coordinated through Public Opinion Research Directorate (PORD)</p> <p>Pre-testing plan (e.g., a Statement of Work to be provided to a research supplier or an email to your institution's Public Opinion Research coordinator advising of the requirement to pre-test and recommending options, or a note to file)</p> <p>Pre-testing budget</p> <p>Pre-testing timetable</p> <p>Research instruments (recruiters' guides, moderators' guides, etc.)</p> <p>Final report of the evaluation of the initial concepts prior to implementation</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p>
<p>Media planning</p> <p>Develop media plan with agency</p> <p>Review and approve plan</p> <p>Submit plan to PCO, ACPD</p> <p>Inform PCO and ACPD of any changes to plan</p> <p>Approve and pay supplier invoices</p>	<p>Budget control report</p> <p>Approved media buy plan</p> <p>Documentation of institutional approval of the plan</p> <p>Pre- and post-buy reports from the Agency of Record (AOR)</p> <p>Media authorization number (ADV) issued by ACPD</p> <p>AOR invoices (including <i>Financial Administration Act</i> section 34 sign-off)</p> <p>Traffic reports (a summary of what time of day and in which media the advertisement appeared, obtained from the AOR)</p>	<p>6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions</p>

	Advertising agency timesheets Status reports Post-buy analysis and reconciliation of budget control report	
Promote	Final copy of the advertisement in all languages (regardless of format) Promotional items	6 years after the campaign ceases, or after no longer used for reference purposes
Post-campaign evaluation and reporting Research and evaluate impact and value of advertising Distribute results as required	Note to file that Advertising Campaign Evaluation Tool (ACET) was used, if applicable (<i>for IRBV relating to POR, see section 1. Public Opinion Research</i>) Note to file that post-campaign evaluation and reporting was coordinated through Public Opinion Research Directorate (PORD) Research instruments (questionnaires, etc.) Evaluation plan Evaluation budget Evaluation timetable Final evaluation report (including data tables) Any other evaluation indicators of campaign's success	10 fiscal years after the end of the fiscal year in which the file closes
File close-out	Advertising campaign file checklist	6 fiscal years after the end of the fiscal year in which the file closes, based on traditional practice applied to IRBV pertaining to financial transactions

(b) Fairs and Exhibits

Plan	Exhibit plan Meeting agendas, minutes Schedules	2 years after end of event
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	Correspondence and other documentation showing coordination with other departments or jurisdictions	
Contract	<i>For all business processes and IRBV relating to contracting out the creation of material for display at fairs and exhibits, please see the Acquisitions GVT.</i>	<i>For retention please see the Acquisitions GVT.</i>
Promote	Promotional materials such as product demonstrations interactive video games films promotional giveaways brochures	2 years after end of event
Report	Feedback forms, comments Reports on exhibits to management	5 years after end of event

6. In-person service, telephone, fax, mail, internet

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Ensure coherence and consistency of communications across all channels	Procedures Service standards Response templates Q&As	5 years after superseded
Ensure compliance with standards Provide liaison services with the public	Reports Correspondence, phone logs Queries (requests for information, complaints) Responses Query management database	2 years after last administrative use

7. Translation services

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Provide translation services	Request forms Emails confirming receipt and/or return of documents Logs, spreadsheets, statistics Style guides for departments	2 years after last administrative use

8. Publications

The business processes and IRBV created by the use of corporate logos in publications will be found in the activity “Corporate Identity” within this GVT.

*The business processes and IRBV created by contracting out any part of the publication process (design, printing, distribution) will be found in the **Acquisitions GVT**.*

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Plan publications Contact Publishing and Depository Services at Public Works and Government Services Canada	Strategic plans for publications Approval of final designs, layouts, proofs Advice on publication, print run, distribution	2 years after last administrative use
Produce publications	Final copies of: Books, manuals, guides Booklets, pamphlets, brochures Newsletters Kit folders Flyers Posters Bulletins	Since government publications are transferred to Library and Archives Canada through legal deposit (LAC Act, section 10), copies in departments need only be retained until reference ceases.

	Technical backgrounders	
Manage copyright and licensing	Correspondence with Publishing and Depository Services	2 years after last administrative use
Manage ISBN and ISSN numbers	Notification of control number from Publishing and Depository Services	2 years after last administrative use
Distribute publications	Approved distribution plan Correspondence with Publishing and Depository Services	2 years after last administrative use
Fulfill requirements for legal deposit	Correspondence with Publishing and Depository Services Shipping documentation	2 years after last administrative use
Manage publications	List of publications Reports (of sales figures, distribution numbers, etc.)	2 years after last administrative use

9. Prepare and implement communications plans and strategies

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Develop departmental communications plan Manage risk communications Manage emergency communications	Departmental communications plan (reviews, updates) Communications strategies (program- or issue-based) Risk communications plan Emergency communications plan Minutes and agendas from planning meetings Internal and external environmental scans	10 years after plan superseded or no longer used for reference purposes

	<i>Please see Cabinet Affairs GVT for IRBV surrounding submission of communications plans as Memorandum to Cabinet</i>	
	Documentation of consultation with other departments Feedback from stakeholders Evaluation reports	2 years after last administrative use

10. Provide communications support to the Minister, senior management and business areas

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Provide advice	Briefing notes or other documents providing advice	2 years after last administrative use
Prepare speeches for Ministers, Deputy Ministers or Assistant Deputy Ministers	Speeches Media lines	2 years for routine; 10 years for key speeches (retention of speeches should be aligned with program to which they refer)
	Meeting minutes Reference material	2 years after last administrative use
Manage Parliamentary affairs	<i>Please see the Management and Oversight GVT for IRBV surrounding Question Period responses, preparation for Parliamentary hearings, etc.</i>	<i>Please see the Management and Oversight GVT for IRBV surrounding Question Period responses, preparation for Parliamentary hearings, etc.</i>

11. Provide editing services

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Provide editing services	Request forms Emails confirming receipt and/or return of documents Logs, spreadsheets, statistics Style guides for department	2 years after last administrative use or after superseded

12. Collaborate with other government institutions

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Manage communications created with other departments	Agendas and minutes from meetings with interdepartmental consultation committees Correspondence	2 years after last administrative use
Manage communications created with external stakeholders, other jurisdictions	Agendas and minutes from meetings with consultation committees Correspondence	5 years after last administrative use

13. Manage marketing events

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Plan	Communications plan for event Briefing notes Meeting agendas, minutes Schedules	2 years after end of program being marketed
Contract	<i>For all business processes and IRBV relating to contracting out marketing events, please see the Acquisitions GVT.</i>	<i>For all retention recommendations relating to contracting out marketing events, please see the Acquisitions GVT.</i>

Report	Feedback forms Reports to management	2 years after end of program being marketed
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14. Communicate with the public through a departmental website

Note: For IRBV related to the contracting of services to design or maintain the website, please refer to the Acquisitions GVT

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Analyze website use (for design, management, and ensuring compliance)	Web analytics Usability testing data Access testing data Testing reports Server logs	2 years after change that it supported is gone or after no longer useful for research purposes <i>Note: Web analytics retained longer than 18 months must be anonymized</i>
Design departmental website Develop website plan Implement website plan	Web strategy plan Website plan Graphic design plans Information architecture, graphs, models Correspondence with PCO (re domain names and links to government priorities) User research (interviews, analytics) Business needs analysis User needs analysis	2 years after superseded
	Minutes of meetings with business areas	2 years after last administrative use
Manage website Maintain website content	Correspondence with clients Web Content Review Plan Web Inventory Report Minutes	2 years after last administrative use or after superseded (as applicable)

	<p>Presentations</p> <p>Documentation re coordination with IT</p> <p>Documentation re coordination with IM</p> <p>Documentation re coordination with other departments</p> <p>Departmental website</p>	<p>Please note: The official version of content should be retained by business area for appropriate time according to their retention schedule.</p>
<p>Ensure compliance:</p> <p><i>Communications Policy of the Government of Canada</i></p> <p><i>Official Languages Policy</i></p> <p><i>Federal Identity Program Policy</i></p> <p><i>Standard on Web Accessibility</i></p> <p><i>Standard on Web Interoperability</i></p> <p><i>Standard on Web Usability</i></p> <p><i>Privacy Act</i></p>	<p>Procedures, tools, guidelines</p> <p>Minutes</p> <p>Compliance/status reports</p> <p>Reports to TBS (when requested)</p> <p>Correspondence with TBS</p>	<p>2 years after last administrative use; 5 years after superseded for procedures</p>
<p>Monitor public needs and comments</p>	<p>Summaries of social media comments</p> <p>Environmental analysis</p> <p>Reports on web analytics</p>	<p>2 years after last administrative use</p>
<p>Provide proactive disclosure information</p>	<p>Reports</p> <p><i>Supporting IRBV for each of the categories of proactive disclosure reports will be found in the appropriate GVT: Travel and Hospitality Expenses (Financial Management), Contracts (Acquisition), Position Reclassifications (Human Resource Management), Grant and Contribution Awards (Transfer Payments) and Founded Wrongdoing in the Workplace (Travel and Other Administrative Services).</i></p>	<p>TBD (based on consultation with Treasury Board Secretariat)</p>
<p>Communicate through social media</p>	<p>Departmental social media strategy</p> <p>Procedures, guidelines, tip sheets</p>	<p>5 years after superseded</p>
	<p>TBS approvals when required</p> <p>Approval documents</p> <p>Rules of Engagement for public</p> <p>Advice from Legal Services</p>	<p>2 years after last administrative use</p>

	Documentation of coordination with IM, IT and Legal Services Privacy impact assessments Reports Correspondence, phone logs Queries (requests for information, complaints) Responses Query management database	
	Information posted on social media that is: not captured elsewhere concerns decisions or the decision-making process is a response from the public to a departmental request for information	Retention will depend on content captured; trigger will be after IRBV has been put into corporate repository

15. Manage internal communications

Business Processes	Recommendations: Information Resources of Business Value (IRBVs)	Recommendations: Retention Period
Manage intranet Design intranet site Monitor intranet site	<i>For IRBV associated with contracting external service providers, please see Acquisitions GVT</i> Design plan Minutes from meetings with service provider (if applicable) Approval of design Internal communications plan Inventory of pages on intranet site Guide for use of intranet site Monitoring reports	2 years after superseded

Produce department newsletter	Final versions	2 years after last administrative use
Develop internal communication products	Final versions Messages from the Deputy Minister Messages from senior management Speeches from DM or senior management Announcements for the launch of new initiatives Event notifications	2 years after last administrative use
Create institutional intranet site	Intranet site	Content of intranet: 2 years after superseded Official version of content retained by business area for appropriate time