

Exhibitions and Publications*This schedule applies to records in all formats***Part 1: Exhibitions and Publications Records Summary**

The records summary gives an overview of the entire schedule.

Permanent Records	Comments
Files of the director; exhibition files and schedules; publication project files including copyright and gallery labels; the publication library; and general reports, manuals, strategic planning files, and grant administration files	Transfer to archives after four years or when no longer needed, depending on schedule
Temporary Records	
Publication agreements, reviews, and photographs; and routine administrative files	Destroy budget records by shredding after seven years; all other records when no longer useful.
Email	
Email accounts including sent email, inbox, folders, calendar	Transferred to archives by IMTS according to museum records policy
Enterprise data management systems	
Database systems such as the collections management system, business systems, and sales and ticketing systems.	Maintained in perpetuity and managed by IMTS

Exhibitions and Publications*This schedule applies to records in all formats***Part 2: Administrative Records**

This section of the schedule describes routine administrative files and applies to all departments in the museum.

Item #	Record Title (Other Titles)	Description	Retain in Office	Retain in Archives	Total	Comments
1	Routine administrative Files - Permanent	Annual and other reports, unpublished, including statistics and program summaries; grant administration files; minutes and related material prepared by your department; policy statements and procedure manuals; and subject files regarding special projects and short and long term (strategic) planning.	CY + 4 years	P	P	
2	Budget materials	Budget working papers and details	7 years	0	7 years	
3	Email		A	P record accounts only	P record accounts	See institutional records management policy on the Ingalls Library website for the list of record and non-record accounts by department
4	Enterprise data management systems		*P	0	*P	Data contained within EMS systems remains in the system in perpetuity. Reports, statistics, and other documents created from the data should be treated like regular departmental business records and transferred to archives at the appropriate time. System installation and management, and the migration of data to new systems, is the responsibility of IMTS.

CY = calendar year

A = active (project is ongoing)

P = permanent

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5	Project plan rooms		A	see comments	see comments	Project plan rooms are transferred to archives at the conclusion of the project. They are retained for CY + 2 years and then appraised for retention. Non-permanent materials are included in appropriate destruction authorization forms.
6	Routine Administrative Files - Temporary	calendars, diaries, employment/intern/volunteer files, inventories, mailing lists, requests for service, research materials, vendor catalogs, time cards and sheets, training files, travel files	A	0	A	Transfer personnel files of terminated employees (including change of status, annual reviews, training files, etc.) to Human Resources for incorporation into the official museum record.

SAA Museum Archives Section Working Group Example

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Exhibitions and Publications*This schedule applies to records in all formats***Part 3: Exhibitions Records**

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Director of exhibitions and publications planning meeting records	agendas and notes of weekly meetings with the director and other members of the executive team	*P	P	P	Records will remain with incumbent exhibition office director indefinitely and be transferred to archives at an appropriate time [such as an administration change].
2	Exhibition files	A) Budget: records by year or by exhibition arranged in binders and including proposals, correspondence, and final budgets. CMA traveling exhibition budget records include copies of invoices and receipts.	CY + 2 years or until all projects are reconciled, whichever comes first	P	P	Electronic correspondence is also retained in appropriate folders in Outlook – copy folders to archives if different than material in paper binders. An Excel spreadsheet is used to track expenses.
		B) Contracts: original contracts for authors/publications; copies of exhibition and guest curator contracts	CY + 1 year for original; as needed for all others	P – originals	P	Duplicate contracts can be discarded by the exhibition office when no longer needed

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		C) General: records of the planning and production of exhibitions - meeting agendas and notes/minutes, catalog details, checklists, images, drafts of contracts, correspondence, technology planning, audio tours, notes of conversations with curators, label copy, grant information, and production schedules	A + 1 year	P	P	Drafts of checklists should be sent to archives. Drafts of catalogs and contracts, and copies of contracts and labels should be discarded prior to transfer to the archives.
		D) Cancelled or Declined: records of exhibitions offered or proposed, but not held	CY + 1 year	P	P	This series will be heavily weeded by department. A selection of rejected proposals will be retained to document what the museum considers to be an inappropriate exhibition.
3	Exhibition schedule	A) an electronic schedule of exhibitions at CMA and other venues and schedule of construction for the new building, 2004-2009	*P	P	P	archives will copy the electronic version from the intranet quarterly; send annotated printouts to archives with appropriate exhibition files
		B) narrative version	CY + 1 year	P	P	send to archives as created or updated, either in paper format or electronically

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Exhibitions and Publications*This schedule applies to records in all formats***Part 4: Publications Records**

Item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Agreements	Co-production and distribution agreements	A	see comments	A + 15	Contracts and agreements must be retained for the term of the contract + 15 years to comply with Ohio contract law. Contracts can be transferred to archives for management if desired or retained in the office.
2	CMA publication reviews	Published reviews	Until no longer useful	0	Until no longer useful	Book review indexes are available in the Ingalls library.
3	CMA publication library	The publications department's copy of CMA publications	*P	0	*P	Three copies of CMA publications are also retained in the Ingalls library.
4	Copyright and ISBN files	Correspondence with the Library of Congress and copyright certificates	A + 4 years	P	P	
5	Gallery labels	label copy for permanent galleries and special exhibitions	A	P	P	Transfer label copy (in PDF format) for major reinstallations of the permanent galleries and special exhibitions
6	Photographs	Images on photographic paper not available in digital form, primarily from recent publications.	Until no longer useful	0	Until no longer useful	

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7	Publication Project files	Planning files for CMA publications including correspondence, contracts, schedules, drafts, galley proofs, administrative records, and budgets.	A + 4 years	P	P	Archives will retain project files for scholarly publications. Drafts, proofs, requests for service, and other non-permanent administrative items will be weeded. Project files for short format items (brochures, calendars, member's magazine, etc.) should be discarded prior to transfer to the archives.
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