

Connecticut Historical Society
Records Retention Schedule

DEPARTMENT: Applicable to All

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years?	Discard
Photos, negatives, audio-visual (unlabeled)		3 years	
Photos, negatives, audio-visual pertaining to institution (labeled)		permanent	
Publications from other organizations	Newsletters, reports, etc.	1 year or until no longer useful	
Minutes, agenda packets from other institutions		until no longer useful	

SAA Museum Archives Section Working Group Example

Connecticut Historical Society
 Records Retention Schedule

DEPARTMENT: Board of Trustees

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years?	Discard
Meeting minutes	Board meetings, committee meetings	permanent	Transfer copy to archives
Constitution, bylaws, acts of incorporation	Includes revisions to bylaws and constitution	permanent	Transfer copy to archives

SAA Museum Archives Section Working Group Example

Connecticut Historical Society
 Records Retention Schedule

DEPARTMENT: Administration/Finance

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years?	Discard
Meeting Minutes	All-staff meetings, department meetings		
Personnel records		Duration of employment plus 30 years	
Receipts, bills		3 years	
Expense reports		3 years	
Reimbursement requests		3 years	
Job announcements		3 years	
Annual meeting planning files		3 years	
Time sheets/cards		7 years	
Bank statements, cancelled checks		7 years	
Payroll files, rolls, ledgers		30 years	
Purchase orders		7 years	
Job applications (not hired)		1 year	
Monthly ledgers/journals, quarterly budget reports		3 years	
Yearly budget reports		permanent	
Audit Reports		permanent	

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DEPARTMENT: External Affairs

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years	Discard
Patron & visitor records		5 years	Discard
Grant proposals (funded)		permanent	Transfer to archives when inactive
Grant proposals (not funded)		3 years	Discard
Grant files		Duration of grant plus 7 years	Transfer to archives when inactive
Donors, lists of		permanent	
Event planning files		3 years	
Donations, letters accompanying		3 years	
Fundraising letters (generic copy)		permanent	Transfer to archives when inactive
News releases, newsletters		permanent	Transfer to archives when inactive
Posters, publicity flyers		permanent	Transfer to archives when inactive
Program information		3 years	Transfer to archives when inactive
Membership lists		3 years	

SAA Museum Archives Section Working Group Example

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DEPARTMENT: Education

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years?	Discard
Interdistrict program grant proposals		Permanent, if copies not sent to External Affairs	
Publications	Curriculum guides, school program brochures, History Day brochures	permanent	
Program materials, Lesson plans for school programs (outreach and tour), statistics of school programs		permanent	
teen internship materials	Curriculum guides, planning documents, publicity	3 years	
policies and procedures for specific programs		permanent	
confirmation binders		3 years	discard
student worksheets & evaluation (one copy of blank form)		3 years	

SAA Museum Archives Section Working Group Example

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DEPARTMENT: Interpretation/Exhibits

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years	Discard
Exhibit files	Label text (not labels), loan information, research, design/layout	permanent	Transfer to archives when inactive

SAA Museum Archives Section Working Group Example

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DEPARTMENT: Museum Collections

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years	Discard
Appraisal records		permanent	Stays with collection manager or curator
Collections control records		permanent	Stays with collection manager or curator
Deaccession records		permanent	Stays with collection manager or curator
Collection and Artifact Acquisition and Exchange Records		Permanent	Stays with collection manager or curator
Loan records		permanent	Stays with collection manager or curator; transfer to archives
Accession records		permanent	Stays with collection manager or curator

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Records Retention Schedule

DEPARTMENT: Library

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		Permanent	Transfer to archives when inactive
Correspondence, routine		3 years	Discard
Reference Request records		5 years	Discard
Accession records		Permanent	
Collection records	Deeds, research, correspondence, invoices for individual manuscript collections or items	Permanent	Remains with Archivist
Deaccession records		Permanent	
Patron registration	Names and addresses of library users	Permanent	Transfer to archives monthly
Call slips	Record of items pulled for patrons	One copy is permanent—other copies (of 3-part form) destroyed after 10 years.	

SAA Museum Archives Section Working Group Example

Connecticut Historical Society
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DEPARTMENT: Old State House (separate or incorporated within other departments?)

Type of Record	Description	Retention Period	Transfer Schedule
Correspondence, policy		permanent	Transfer to archives when inactive
Correspondence, routine		3 years	Discard
Education materials			
Programs			
Building			
Budget			

SAA Museum Archives Section Working Group Example