

THE CLEVELAND MUSEUM OF ART  
RECORDS RETENTION AND DISPOSITION SCHEDULE  
GENERAL SCHEDULE, ALL DEPARTMENTS

**This schedule pertains to records in all formats**

item #	Record Title (other titles)	Description	Retain in Office	Retain in Archives	Total Retention	Comments
1.	Administrative files, routine	purchase orders for routine purchases, travel vouchers, time sheets, leave applications, training files, budget working papers (usually copies)	A	0	A	Detailed and summary financial records come to the archives from the finance department
2.	Annual reports of department	unpublished reports	5 years	P	P	electronic versions can be forwarded to archives upon publication
3.	Budget working papers		7 years	0	7 years	
4.	Budget details		4 years	0	4 years	
5.	Calendars, diaries, personal	[check with archives staff]	7 years	0 [P]	7 years or [P]	calendars are selectively retained
6.	Correspondence, routine <i>includes e-mail</i>	includes letters of transmittal, cover letters, announcements, address changes, invitations, acknowledgments, reservations, confirmations, travel itineraries, and routine requests for general information	4 years	0	4 years	
7.	Correspondence, substantive <i>includes e-mail</i>	correspondence related to policy, procedures, activities, and art work [except for correspondence in object files]	A + 2 years	P	P	
8.	Drafts		A	0 [P]	A [P]	[transfer only drafts with significant comments or annotations]

CY = calendar year    A = active (project is ongoing)

P = permanent

\*P = permanent, retain in office of origin

DEPARTMENTAL RETENTION AND DISPOSITION SCHEDULES TAKE PRECEDENCE OVER THE GENERAL RETENTION SCHEDULE.

RECORDS RETENTION AND DISPOSITION SCHEDULE. GENERAL SCHEDULE, ALL DEPARTMENTS

item #	Record Title (other titles)	Description	Retain in Office	Retain in Archives	Total Retention	Comments
9.	Employment applications and related correspondence	includes internship and volunteer applications	A	0	A	Human Resources and volunteer initiatives are the offices of record
10.	Forms, blank (superseded)		0	0	0	Print shop is the office of record
11.	Grant records – grants received	if not completely duplicated in Development	A + 5 years	P	P	
12.	Grant records – grants denied		2 years	5 years [P]	7 years [P]	selectively retained [consult archives staff before discarding]
13.	Inventories of supplies and equipment on hand		7 years	0	7 years	
14.	Memoranda, incoming <i>includes e-mail</i>	merge with appropriate correspondence and use that retention schedule				
15.	Memoranda, outgoing, routine and substantive <i>includes e-mail</i>	merge with appropriate correspondence and use that retention schedule				
16.	Mailing lists		A + 1 year	0	A + 1 year	
17.	Minutes and related material prepared by your department		A + 2 years	P	P	
18.	Minutes and related material, all others	informational copies of meeting minutes and related material NOT created by your department	A	0	A	see schedule for originating office [consult archives staff before discarding]

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DEPARTMENTAL RETENTION AND DISPOSITION SCHEDULES TAKE PRECEDENCE OVER THE GENERAL RETENTION SCHEDULE.

item #	Record Title (other titles)	Description	Retain in Office	Retain in Archives	Total Retention	Comments
19.	Personnel files, time cards, time sheets	departmental personnel files	A	0	A	Human Resources is the department of record. Transfer all inactive personnel records to Human Resources.
20.	Phone logs	phone call message books and pads	A	0	A	discard when no longer useful
21.	Policy statements		A	P	P	
22.	Procedure manuals and statements		A	P	P	
23.	Press releases and news clippings		A	0	A	Communications is the office of record
24.	Professional journals	serial publications of professional organizations	A	0	A	Contact Ingalls library staff for possible transfer to the library
25.	Publications	all printed documentation including invitations, brochures, pamphlets, catalogues, books, newsletters, programs, calendars, guides, gallery maps, flyers, posters, and announcements	A	0	A	Publications and Communications are the offices of record
26.	Reference/reading files	files maintained for reference purposes only	A + 1 year	0	A + 1 year	
27.	Requests for service	service requests for routine maintenance, printing, set up, photograph, and slide orders	A	0	A	
28.	Supply/vendor catalogs		A	0	A	
29.	Telephone directories		A	0	A	

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 DEPARTMENT RETENTION AND DISPOSITION SCHEDULES TAKE PRECEDENCE OVER THE GENERAL RETENTION SCHEDULE

**CLEVELAND MUSEUM OF ART  
RECORDS RETENTION AND DISPOSITION SCHEDULE  
VITAL RECORDS**

*This schedule pertains to records in all formats*

<b>Item #</b>	<b>Record title (other titles)</b>	<b>Description</b>	<b>Office of Origin</b>	<b>Retain in Office</b>	<b>Retain in Archives</b>	<b>Total Retention</b>	<b>Comments</b>
1.	Agreements and contracts – general		All departments	A + 4 years	10 years	15 years	This retention conforms to Ohio breach of contract laws
2.	Agreements and contracts – capital property improvements and exhibitions		Director, deputy director for administration	A + 4 years	P	P	Retain in controller's office until transfer to the archives
3.	Annual reports		Publications	Copies as needed	P	P	Send published report in both paper and electronic form to archives upon publication
4.	Articles of Incorporation, Code of Regulations, and amendments		Director/Secretary to the Board	Photocopy	P	P	Send certified copy to archives upon receipt, maintain copies in museum departments as needed and appropriate
5.	Attorney-client privileged files		Director and deputy directors	A	P	P	Retire to archives upon settlement of case
6.	Bills of sale, deeds of gift, and supporting documents	For artwork	Director, curatorial, registrar	*P	0	*P	To be retained in registrar's office object files
7.	Board of Trustees minutes	Minutes and supporting documents	Director/Secretary to the Board	CY + 2 years	P	P	Maintain signed copy in the director's office for two years then transfer to archives, send electronic copy to archives upon approval

CY = current year

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P = permanents

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VITAL RECORDS SCHEDULE

Item #	Record title (other titles)	Description	Office of Origin	Retain in Office	Retain in Archives	Total Retention	Comments
8.	Board of Trustees committee minutes (standing and ad hoc)	Minutes and supporting documents	Director/Secretary to the Board and any other offices responsible for creating these records	CY + 2 years	P	P	Maintain signed copy in the office of origin for two years then transfer to archives, send electronic copy to archives upon approval
9.	Budgets and audits		Finance	CY + 5 years	P	P	Send copy of audit to archives upon publication
10.	Correspondence pertaining to gifts of art		Director, development, finance	*P photocopies as needed	0	*P	Retain original in object files in registrar's office; maintain photocopies in museum departments as needed and appropriate
11.	Correspondence pertaining to dedicated funds		Director, development finance	CY + 2 years	P	P	
12.	Deeds, titles, easements, mortgages, and licenses pertaining to real property		Director, deputy director for administration	Photocopy	P	P	Send certified copy to archives when received; maintain photocopies in museum departments as needed and appropriate
13.	Donor files		Development	*P	0	*P	
14.	Financial ledgers	General, endowment, and capital projects ledgers	Finance	A (through annual audit)	P	P	Copy yearly endowment details along with the general ledger to DVD in an excel file and ACSII text and transfer to archives; print out end of year from database and send to archives
15.	Grant files	Grants awarded	Development	A + 4	P	P	
16.	Long Range plans or forecast		Director	A	P	P	Send copy to archives upon publication, send original when superseded

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VITAL RECORDS SCHEDULE

Item #	Record title (other titles)	Description	Office of Origin	Retain in Office	Retain in Archives	Total Retention	Comments
17.	Object files		Registrar	*P	0	*P	
18.	Object files		Curatorial	*P	0	*P	
19.	Organizational charts		Human Resources	A	P	P	Send copy to archives when updated
20.	Policy statements	Policies related to all museum programs and activities	All departments	A	P	P	
21.	Trust documents		Development	A	P	P	Retire to archives when trust is formalized; maintain photocopies in museum departments as needed and appropriate
22.	Wills		Development	A	P	P	Send certified copy to archives when estate is settled; maintain photocopies in museum departments as needed and appropriate

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SAA Museum Archives Section Working Group Example

## Collections Management

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Autographs	correspondence from artists having autograph value	*P	0	*P	stored in collections storage.
2	Bills of sale, deeds of gift, and supporting documents	For artwork	*P	0	*P	
3	Board of Trustees accessions committee records	preparatory material for accession committee meetings and copies of minutes	*P	0	*P	
4	Cleveland Collectors files	census of art owned by local collectors, includes provenance information and if CMA has a photograph of the object	*P	0	*P	Record series no longer active; used for reference purposes only.
5	Facility reports	reports for institutions other than CMA	*P	0	*P	Series is weeded periodically to keep it current. Outdated reports are shredded.
6	Infomaker	Report creating software used with databases	*P	0	*P	
7	Loan exhibition files	working files containing contracts, shipping orders, correspondence, exhibition meeting minutes, <i>condition notebooks</i> , and other records	A + 2 years	P	P	

## Collections Management

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
8	Loan exhibition files – reference	reference material about exhibitions for use by researchers. General information about exhibitions used by staff and to respond to research requests. Files contain final checklist, final lender list, signed contract, OR/IRs for exhibition, final budget, copy of our indemnity and immunity from seizure applications; labeled installation views (one set), and press materials (including reference materials)	*P	0	*P	
9	Loan request records	correspondence and related records pertaining to requests for loans of CMA artwork	CY + 5 years	P	P	
10	Long term loan files	Records about objects on long term loan to CMA but not owned by CMA	*P	0	*P	



**Collections Management***This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
11	Object card files	Index cards pertaining to works of art arranged by year, by collection category, by artist/title, by loan number, by exhibition, by donor, and by location. There is also an alphabetical series of cards for everyone who brought in an artwork for any reason (such as for examination or study).	*P	0	*P	
12	Object files	files containing correspondence, conservation reports, original deeds of gift and bills of sale for art work, copies of the "Bulletin", and exhibition information on a work of art owned by CMA	*P	0	*P	Maintain photocopies of records in curatorial offices as needed and appropriate.
13	Outgoing loan files	chronological file by month documenting outgoing loans of CMA objects	A+1	0	P	Will remain onsite for access
14	Incoming and Outgoing receipts (Irs/ORs) and Art Passes	formerly known as shipping reports	CY + 10	P	P	Will remain onsite for access
15	Photographs – objects	includes non-accessioned works and objects in loan exhibitions	*P	0	*P	

## Collections Management

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
16	Photographs – exhibition and gallery views	<p>Gallery views come from Photo Studio as .tiffs, these images are edited and IR numbers for each object are added. The edited images are saved as .jpgs. There are also photo prints of the unedited .tiffs and color paper prints of the edited jpegs.</p> <p>A) Special exhibition gallery views</p>	*P	P	*P	Send electronic copies of edited jpegs to archives at the conclusion of all special exhibitions. Also retain a copy in the office.
		<p>B) Initial permanent gallery installation views</p>	*P	P	*P	Send electronic copies of edited jpegs to archives after new permanent galleries are installed or completely re-installed. Also retain a copy in the office.
		<p>C) Routine permanent gallery installation views (whenever any piece of art is swapped out of the galleries new images are taken)</p>	*P	0	*P	Do not send routine permanent gallery installation views to archives. Retain in office.

## Collections Management

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
17	Receipt of object and expect notices	yellow copies of receipts attached to expect notices; white and pink copies are forwarded to curatorial offices as needed and appropriate	*P	0	*P	White and pink copies of receipts can be discarded during processing of curatorial collections.
18	Rights and reproduction records	correspondence and rights/reproduction agreements for use of CMA objects	CY + 2 years	12 years	15 years	
19	Subject files	alphabetical subject files not specific to CMA objects retained for reference purposes	*P	0	*P	This series is periodically updated and weeded.
20	TR/IR (temporary/incoming receipt) books	a chronological record of artwork entering the museum for exhibition, examination, or other reasons	*P	0	*P	
21	Imaging studio database	Records the activities of the imaging studio. Contains names and locations of all high resolution images	*P	0	*P	In Access. Database is very large with relational tables.
22	Imaging studio images	High resolution images of object and editorial photography stored off line on DVD. Object photography with IR numbers is retained only on hard disk until/unless the object is accessioned.	*P one copy	P one copy	P	Storage procedures may change with the implementation of a digital asset management system.

The Cleveland Museum of Art Records Retention and Disposition Schedule

## Conservation

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Administrative files	Includes budget records, travel records, training files, and other general administrative files	A	0	A	Detailed and summary financial records come to archives from accounting.
2	Collection Management System	Including service requests and art movement requests	*P	0	*P	
3	Conservation project files	Files relating to special projects, visiting conservators, proposed accessions, and collectors. Includes non-centralized records kept by CMA conservators.	A + 5 years	P	P	
4	Exhibition files		A + 2 years	P	P	This record series will be heavily weeded for duplicates.
5	Frames	Information on conservation and identification of frames	*P	0	*P	
6	Grant administration files	For conservation projects funded through grants	A + 5 years	P	P	
7	Infrared image negative database		*P	0	*P	Negatives are in sotrage. [Will these be added to Piction?]
8	Infrared reflectograms	Prints and negatives	*P	0	*P	Newer images are stored digitally. [will these be added to Piction?]

The Cleveland Museum of Art Records Retention and Disposition Schedule

**Conservation**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
9	Material Safety Data Sheets	Information on hazardous materials arranged by compound and related reference material on disaster recovery.	*P	0	*P	
10	Object files	May include treatment proposals and reports, correspondence, slides, loan examinations, photographs, and X-rays.	*P	0	*P	Includes files for all collections.
11	Object fragments	Fragments detached from the original object and stored in envelopes	*P	0	*P	These are not archival records.
12	Scientific and analytical records	Scientific data and analyses of scientific data	*P	0	*P	
13	Subject files	Records related to museum projects not specific to conservation such as strategic planning, interpretation, lectures, and professional projects and associations	A + 5 years	P	P	This series will be heavily weeded depending on record status.
14	Thermohyrometer Reports		CY + 4 years	10 years	15 years	The statute of limitations for breach of contract claims in Ohio is 15 years preventing lenders of objects to exhibitions from filing claims after that time.
15	Treatment files – private collections	Treatment of privately owned artwork ended in 1993	0	P	P	These records can be transferred to archives immediately.

The Cleveland Museum of Art Records Retention and Disposition Schedule

**Conservation**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
16	Vendor files	In addition to the usual equipment vendors this series also includes vendors for radiation-containing equipment and accompanying state regulated reports, licenses, and testing results.	*P	0	*P	Weed files of defunct vendors periodically.
17	X rays		*P	0	*P	

SAA Museum Archives Section Working Group Example

**Curatorial Division**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Administrative Files, routine	A) Calendars, diaries, employment applications and related correspondence (including internship and volunteer applications), inventories of supplies and equipment, leave applications, mailing lists, personnel files, phone logs, purchase orders for routine purchases, requests for service, research materials, supply/vendor catalogs, telephone directories, time cards and sheets, training files, travel vouchers  B) Budget working papers and details	A  7 Years	0  0	A  7 Years	
2	Affiliate group files	records of affiliate groups such as the Print Club, Textile Arts Alliance, Contemporary Art Society, etc.	CY + 2 years	P	P	CAS, TAA, and The Print Club do not bank with CMA. These financial records should be kept for 7 years and then discarded. Endowment account statements should be sent to archives by the Affiliate Group Coordinator.
3	Annual Reports for your department	Detailed unpublished reports including statistics, program summaries, and quarterly reports	5 years	P	P	

**Curatorial Division***This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
4	Board of Trustees Accessions Committee files	records of meetings along with all preparatory and ancillary documents	CY + 2 years	P	P	
5	Board of Trustees Collections Committee Files	records of meetings along with all preparatory and ancillary documents	CY + 2 years	P	P	
6	Catalog preparation records	all records related to the preparation of collection catalogs	A + 2 years	P	P	It is expected that this series will be heavily weeded.
7	Census of Cleveland Private Collections		A	P	P	
8	Correspondence and memoranda, general, substantive	May be divided into subseries such as artists, institutions - see general schedule	A + 2	P	P	
9	Dealer files	Correpondence, may include photographs	A + 2 years	P	P	
10	Exhibition files	all records related to the planning and preparation of exhibitions including research files	A + 2 years	P	P	
11	Exhibitions proposed, cancelled, declined	records of exhibitions proposed or offered but not held	A	P	P	This series will be heavily weeded.
12	Grant Administrative Files for grants received		A + 5 years	P	P	
13	Gallery interpretation project	Records of the installation, reinstallation and interpretation of permanent galleries	A + 5 years	P	P	
14	Label copy	For permanent galleries	*P	0	*P	
15	Loan files	records related to the loan of art objects	A + 2 years	P	P	



**Curatorial Division**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
16	Minutes and related materials prepared by your department	Includes staff meeting minutes and agendas	A + 2 years	P	P	Discard informational copies of meeting minutes and related materials NOT created by your department when they are no longer useful
17	Object files	records of artwork in CMA collections (records of conservation work, copies of expert notices and IRs, copies of bills of sale, correspondence with dealers and donors, reference requests regarding objects, etc.) and accession cards	*P	0	*P	
18	Object photographs		*P	0	*P	Retain as needed or desired
19	Policy Statements and Procedure Manuals		A	P	P	
20	Professional Activity files	Records related to participation in professional organizations and records of relevant interviews and articles	CY + 1 year	P	P	Extensive weeding is expected. Send articles and interviews not conducted through the marketing department, and not included in the NY Times or Cleveland.com (the library and archives clip these publications)

**Curatorial Division***This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
21	Receipt of object and expect notices		CY + 1 year	0	3 years	Record copy is retained in the registrar's office
22	Reference Correspondence	Requests for general information about the museum and collections	CY + 1 year	0	2 years	
23	Special Projects	files on unique, one-time projects	A + 1 year	P	P	
24	Subject files	May include records of museum committees, strategic planning, records relating to other institutions, research on artists, etc.	A + 2 years	P	P	

## Education and Public Programs - Interpretation

This schedule applies to records in all formats

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	<b>Interpretation - Administrative Files, routine</b>	A) Calendars, diaries, employment applications and related correspondence (including internship and volunteer applications), inventories of supplies and equipment, leave applications, mailing lists, personnel files, phone logs, purchase orders for routine purchases, requests for service, research materials, supply/vendor catalogs, telephone directories, time cards and sheets, training files, travel vouchers	A	0	A	
		B) Budget working papers and details	7 Years	0	7 Years	
2	<b>Interpretation - Academic Programs</b>	A) CWRU Joint Program	A + 5 years	P	P	
		B) Internships	A + 5 years	P	P	
		C) Sages Program	A + 5 years	P	P	
3	<b>Interpretation - Adult Programming</b>	Records of adult programming including lecture series, tours, and book club	A + 5 years	P	P	
4	<b>Interpretation - Docent Program</b>	Records of the docent program; training manuals and other materials	A + 5 years	P	P	

## Education and Public Programs - Interpretation

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
5	<b>Interpretation</b> - Education Art Accession and Object records	Includes correspondence, bills of sale, conservation reports, research, and other records specific to objects in the Education Art Collection	*P	0	*P	
6	<b>Interpretation</b> - Education Art Accession Binders	Notes and analysis of incoming objects, condition reports, and an inventory of the old Extensions department	Some P	Some P	P	Integrate records related to specific objects into the accession records. Transfer all other records to archives.
7	<b>Interpretation</b> - Education Art Loan Records	Includes records relating to the Mary Warner collection - a long term loan from the city of Cleveland. Records of Education Art Collection loans are copies of records from the Registrar's office	A	Some P	Some P	Retain copies of loan records from the Registrar's office until no longer useful. Transfer loan records from the period of the Extensions department to archives.
8	<b>Interpretation</b> - Education Art object cards	Arranged by accession number and cross referenced by country and subject	*P	0	*P	
9	<b>Interpretation</b> - Education Art Object Labels	Printed on card stock	*P	0	*P	Used for reference

**Education and Public Programs - Interpretation***This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
10	<b>Interpretation</b> - Education Art Subject Files	Includes administrative records (see item #1) and projects specific to ATG such as information on NAGPRA and WPA and FAP project records	A + 1 years	P	P	Subject files related to objects should be reviewed for inclusion in accession records
11	<b>Interpretation</b> - Exhibition Programming	Lectures, demonstrations, family days, and other programming related to special exhibitions	A + 5 years	P	P	
12	<b>Interpretation</b> - Gallery Interpretation records	Records related to gallery and exhibition interpretation (reinstallation of permanent galleries, art carts, audio programs, focus gallery, internships)	A + 5 years	P	P	
13	<b>Interpretation</b> - Grant Administration Files for grants received		A + 5 years	P	P	
14	<b>Interpretation</b> - Procedure manuals and statements		A	P	P	Can be sent electronically when superseded.

## Education and Public Programs - Public Programs and LLC

This schedule applies to records in all formats

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Administrative Files, routine	A) Calendars, diaries, employment applications and related correspondence (including internship and volunteer applications), inventories of supplies and equipment, leave applications, mailing lists, personnel files, phone logs, purchase orders for routine purchases, requests for service, research materials, supply/vendor catalogs, telephone directories, time cards and sheets, training files, travel vouchers	A	0	A	
		B) Budget working papers and details	7 Years	0	7 Years	
2	Early Learning Programs	Includes records of meetings with partners, lesson plans, and content and evaluation materials	A + 3 years	P	P	
3	Family and Youth Programs	Includes content development records for family days and museum children's classes	A + 3 years	P	P	Drafts of announcements and schedules provided to marketing for publication should be discarded before transfer to archives

## Education and Public Programs - Public Programs and LLC

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
4	Grant Administrative Files for grants received		A + 3 years	P	P	May be included with other programming records such as the development of the LLC and early learning programs
5	Lifelong Learning Center	Development, planning, and program files for the LLC. Includes records of physical and media design, conceptual drawings, records of content creation, meeting minutes, correspondence with contractors, and board of trustee material	A + 3 years	P	P	Architectural drawings duplicated by Vinoly, Panzica Gilbane, or RISE group should be discarded before transfer to archives
6	Policy Statements		A	P	P	Can be sent electronically when superseded.
7	Procedure manuals and statements		A	P	P	Can be sent electronically when superseded.
8	Studios	Records of studio classes including lists of teachers, evaluations, scheduling information, supply inventories, and vendor information	A	0	A	
9	Teen Programs	Records of the Museum Ambassadors Program	A + 3 years	P	P	

**Exhibitions Office**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
1	Administrative Files, routine	A) Calendars, diaries, employment applications and related correspondence (including internship and volunteer applications), inventories of supplies and equipment, leave applications, mailing lists, personnel files, phone logs, purchase orders for routine purchases, requests for service, research materials, supply/vendor catalogs, telephone directories, time cards and sheets, training files, travel vouchers	A	0	A	
		B) Budget working papers and details	7 Years	0	7 Years	
2	Annual Reports for your department	Detailed unpublished reports including statistics, program summaries, and quarterly reports	5 years	P	P	
3	Comment books	comments written by visitors about special exhibitions	CY	P	P	



## Exhibitions Office

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
4	Director of exhibitions planning meeting records	agendas and notes of weekly meetings with the director, deputy director for collections and programs, director of design and architecture, and associate director for development [grants]	*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].
5	Exhibition files - budgets	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.
6	Exhibition files - 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

## Exhibitions Office

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
7	Exhibition files – 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.
8	Exhibition files – exhibitions proposed, cancelled, declined	records of exhibitions offered or proposed, but not held	CY + 1 year	P	P	This series will be heavily weeded. A selection of rejected proposals will be maintained to document what the museum considers to be an inappropriate exhibition.
9	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

**Exhibitions Office**

*This schedule applies to records in all formats*

item #	Record Title	Description	Retain in Office	Retain in Archives	Total	Comments
10	Grant Administrative Files for grants received		A + 5 years	P	P	
11	Minutes and related materials prepared by your department	Includes staff meeting minutes and agendas	A + 2 years	P	P	Discard informational copies of meeting minutes and related materials NOT created by your department when they are no longer useful
12	Policy Statements and Procedure Manuals		A	P	P	

SAA Museum Archives Section Working Group Example