

Records Retention Schedule Template

Museum of Art Contact Jo Jones 335-1723

DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?	CURRENT RECORD FORMAT	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES CURRENTLY IN PLACE?
		LEGAL	ACTIVE	NON-ACTIVE						
		(CY: Current Yr)								
collection inventory	Jeff Martin		permanent		no	no	yes	PC/paper	partially	locked office
exhibition files	Jeff Martin		indefinitely	indefinite	no	no	no	paper	no	locked office
security information	Jeff Martin		indefinitely		no	yes	yes	PC/paper	yes	locked office
exhibition contracts	Jeff Martin		length of the exhibition	indefinite	yes	no	yes	paper	yes	locked office
loan agreements	Jeff Martin		length of the loan	indefinite	yes	no	yes	paper	no	locked office
donor files	Jeff Martin		permanent		yes	yes	yes	paper	partially	locked office
collection management files	Jeff Martin		permanent		no	no	no	photographic / slides / PC	no	locked office
search materials	Jo Jones		CY + 3		yes	yes	no	paper	yes	locked office
departmental financial records/statements	Jo Jones		CY + 3		yes	no	no	PC/paper	yes	file cabinet
employee records	Jo Jones		Indefinitely	indefinite	yes	yes	yes	PC/paper	partially	Locked office or locked file cabinet
equipment inventory	Jo Jones		CY + 3		no	no	no	paper	yes	file cabinet
reviews and accreditation	Jo Jones		CY + 9	indefinite	yes	no	no	paper	partially	cabinet
store inventory	Jo Jones		indefinitely		no	no	no	PC/paper	yes	locked office
museum policies and procedures	Jo Jones		indefinitely		no	no	no	paper	partially	cabinet
Office Correspondence of an Official Nature	Jo Jones		indefinitely	indefinite	no	no	no	PC/paper	yes	file cabinet
membership files and contribution records	Buffie Tucker		permanent		no	yes	no	PC	yes	password required
Notes:										
1) The retention period for convenience copies is 3 years which is a guideline and not a requirement.										
2) The custodian has official responsibility for retention and disposition of the record.										
3) An "Official Record" is the single official copy of a document maintained on file by an administrative unit of FUS which is usually, but not always, the original.										
Convenience copies are not official records.										
4) A "Confidential Record" is unavailable to the general public unless otherwise ordered by court, by the lawful custodian or by another person duly authorized.										
Medical, student and personnel files are examples.										

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5) A "Vital Record" is one which is absolutely essential in order to continue doing business or to preserve the rights of the unit, its employees and the general public.										
6) "Office Correspondence of an Official Nature" refers to policies, procedures, reports (internal or external), etc. that are used in the administration and management of the department and that should be memorialized.										