



Help Pages to Native Catholic Record Guides
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RECORD RETENTION AND DISPOSITION SCHEDULE FOR MUSEUM/ HERITAGE CENTER

Secondary Schedule

rev. 2002

REFERENCE SOURCE: *Records Management for Parishes and Schools*, compiled by David P. Gray, Association of Catholic Diocesan Archivists, 1987

SHORT-TERM RECORDS: DISPOSE AS NOTED

- Administrative: Catalogs (Books, Equipment, Supplies). [Destroy when superseded.]
- Administrative: Election Ballots. [Destroy after 1 year; Shredding recommended.]
- Financial: Bank Deposit Slips and Register. [Destroy after 5 years; Shredding recommended.]
- Financial: Bank Statements. [Destroy after 5 years; Shredding recommended.]
- Financial: Canceled Checks and Check Stubs. [Destroy after 5 years; Shredding recommended.]
- Financial: Cash Book (Daily Receipts and Disbursements). [Destroy after 5 years; Shredding recommended.]
- Financial: Check Registers. [Destroy after 5 years; Shredding recommended.]
- Financial: Correspondence on Payments/Receipts. [Destroy after 5 years.]
- Financial: Expansion Fund Prospects. [Destroy when superseded; Shredding recommended.]
- Financial: Loan Files. [Destroy after 5 years; Shredding recommended.]
- Financial: Paid Bills. [Destroy after 5 years; Shredding recommended.]
- Financial: Receipts. [Destroy after 5 years; Shredding recommended.]
- Financial: Special Collections. [Destroy after 1 year; Shredding recommended.]
- Financial: Tax Records (Corporate and Personal). [Destroy after 1 year; Shredding recommended.]
- Financial: Treasurer's Account Book. [Destroy after 1 year; Shredding recommended.]
- Personnel: Employment Contracts. [Destroy 5 years after termination; Shredding recommended.]
- Personnel: Individual Files (Applications, Contracts, Evaluations, Resumes). [Destroy 10 years after termination; Shredding recommended.]
- Personnel: Job Descriptions. [Destroy when superseded.]
- Personnel: Social Security Withholding Records. [Destroy after 4 years; Shredding recommended.]
- Personnel: Tax Forms (W-2s, W-3s, W-4s). [Destroy after 5 years; Shredding recommended.]
- Personnel: Time Cards. [Destroy after 2 years; Shredding recommended.]

SHORT-TERM RECORDS (CONTINUE): DISPOSE AS NOTED

Personnel: Vacation and Sick Leave Forms. [Destroy after 5 years; Shredding recommended.]
Property: Equipment Files (Inspections, Instructions, Manuals, Warranties). [Destroy when superseded.]
Property: Insurance Records (Claims, Correspondence, Policies). [Destroy when superseded; Shredding recommended.]
Property: Inventories. [Destroy when superseded.]

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION AND MICROFILMING

Administrative: Accession Records- Texts in print-form only (Artistic/Cultural Objects).
Administrative: Accession Records- Texts in print-form only (Books and Library Materials).
Administrative: Acquisition List.
Administrative: Announcements.
Administrative: Annual Reports.
Administrative: Appointments File.
Administrative: Articles of Incorporation.
Administrative: Constitutions and By-laws.
Administrative: Correspondence- Official (Policy, Directives).
Administrative: Correspondence- Routine. [After 1 year, selectively weed and destroy and transfer remainder to Marquette.]
Administrative: Minutes (Advisory Board/Board of Directors).
Administrative: Programs.
Administrative: Publications.
Administrative: Reports.
Administrative: Rosters.
Administrative: Subject Files (Correspondence, Memos, Rules, Schedules). [After 1 year, selectively weed and destroy and transfer remainder to Marquette.]
Financial: Audit Reports.
Financial: Building Fund Account Book.
Financial: General Ledger.
Financial: Statements.
Financial: Trust Fund/Estate Contributions.
Property: Appraisals.
Property: Architectural Drawings and Specifications of Buildings.
Property: Construction Files (Contracts, Correspondence).
Property: Deeds (Including Abstracts).
Publications: Activity Programs.
Publications: Anniversary Booklets.
Publications: Annual Reports (Parish).
Publications: Bulletins.
Publications: Histories.
Publications: Informational Books and Pamphlets.
Publications: Newsletters.
Publications: Public Relations.

PERMANENT RECORDS: RETAIN COPY AND TRANSFER ORIGINALS TO MARQUETTE FOR PRESERVATION AND REFORMATTING

Administrative: Accession Records- Digitized texts with images (Artistic/Cultural Materials).

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR
PRESERVATION AND DIGITAL SCANNING
Publications: Photographic Files.

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR
PRESERVATION AND REFORMATTING
Recordings: Cultural Programs (Locally Based Recordings).
Recordings: Informational Programs (Locally Based Recordings).