


## Diocese of Houma – Thibodaux Records Retention Schedule

Department/Section: Administrative Records		Effective Date 8/1/2018		Schedule No. 1	Page
Records Series Title	Description	Retention Period			Final Disposition
		Active	Inactive	Total	
Administrative Files	<b>Administrative Files</b> - A filing system specific to the needs of an individual office; arranged by the office, to provide a record and source of information concerning the administration and responsibilities of that office. Files should contain chronological breaks. <i>Administrative Decision</i>	2	1	3	Destroy
Administrative Meeting Minutes	<b>Administrative Meeting Minutes</b> – may include an advisory or ad-hoc committees. <i>Administrative Decision</i>	2	1	3	Send to Archives for archival review
Administrative or Working Papers	<b>Administrative or Working Papers</b> - a report showing either the intermediate stages of a project being worked on or relating to the operations or functions of a department. <i>Administrative Decision</i>	2	1	3	Destroy
Advertisements	<b>Advertisements</b> – created by or for the Diocese of Houma-Thibodaux to announce special programs or events sponsored by the Diocese of Houma-Thibodaux. <i>Administrative Decision</i>	2	1	3	Destroy
Annual or Major Project Reports	<b>Annual or Major Project Reports</b> – an annual or major report that may be received or commissioned by the Bishop, a corporate board /committee, or an executive. May include Annual Pastoral Report, Quinquennial Report, Parish Visitation Reports, Dean’s Parish Visitation Reports, or Annual Sunday Count. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases.	Permanent	Permanent
Artifacts	<b>Artifacts</b> – a three-dimensional unique object, typically an item of cultural or historical interest, i.e. artwork, statues, etc. <i>Administrative Decision</i>	Administratively useful.	Administrative value ceases.	Active +	Pending Archival Review.
Awards and Tributes	<b>Awards and Tributes</b> – honors or recognitions bestowed upon an individual or Diocesan entity. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases	Active +	Archival review

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Bishop Appointment Book	<b>Bishop Appointment Book</b> - the bishop's daily calendar. <i>Administrative Decision</i>	1	0	Permanent	Permanent
Client Records	<b>Client Records</b> – may include personally identifiable information, length of service(s), location of service(s), and type of services(s) provided. <i>Administrative Decision</i>	Client is receiving services.	Six years after client services are discontinued.	Active +6	Destroy six years after services have been discontinued.
Conferences, Seminars, Workshops	<b>Conferences, Seminars, and Workshops</b> – held by the Diocese. May include final brochure or programs, summary evaluations, registration summary, final financial summary, sample presentations, speaker information, and contracts. <i>Administrative Decision</i>	5	0	5	Pending Archival Review.
Correspondence, Administrative	<b>Administrative Correspondence</b> - correspondence, in any format - paper or electronic- or medium – paper, e-mail, text, etc., that documents general departmental functions or relates to day-to-day business operations. <i>Administrative Decision</i>	2	1	3	Destroy
Correspondence, Executive	<b>Executive Correspondence</b> - correspondence, in any format - paper or electronic- or medium – paper, e-mail, text, etc. –, that is business related and provides substantive information about Diocesan entities, their functions, policies, procedures, or programs. Executive correspondence documents the decisions and discussions of the Diocese. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases.	Permanent	Permanent
Correspondence, Reference	<b>Reference Correspondence</b> - received correspondence, in any format, that is only used for reference purposes (i.e. meeting schedules, conferences, workshops, catalogues, etc.). May contain attachments. This classification may not be used for records that document business processes or managerial decisions. <i>Administrative Decision</i>	1	0	1	Destroy
Correspondence, Transient	<b>Transient Correspondence</b> – received correspondence, in any format, of only a temporary value. <i>Administrative Decision</i>	90 days	0	90 days	Destroy

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Election Ballots	<b>Election Ballots</b> - ballots used for voting for a position. <i>Administrative Decision</i>	1	0	1	Destroy
General Appointment Books	<b>General Appointment Books</b> - calendar maintained by individual employees. <i>Administrative Decision</i>	1	0	1	Destroy
Journals and Diaries	<b>Journals and Diaries</b> – an unpublished first-hand account from an individual used to record their private thoughts or reflections. <i>Administrative Decision</i>	0	0	0	Pending archival review
Mailing Lists	<b>Mailing Lists, Subscriber, Membership Lists</b> – mailings lists of all parishes, schools, organizations, departments and offices. <i>Administrative Decision</i>	Administratively useful	When superseded	Active until superseded	Destroy
Maintenance Requests and Repairs	<b>Maintenance Requests and Repairs</b> – may include request for a repair or general maintenance and resolutions to requests. <i>Administrative Decision</i>	Administratively Useful	Administrative Value Ceases.	Active + until administrative value ceases.	Destroy after admin. value ceases.
Manuscript Collections	<b>Manuscript Collections</b> – papers donated to the Diocese of Houma-Thibodaux, may include personal papers of an influential Catholic from Louisiana or records from a Catholic organization, institution, or group that was from Louisiana. <i>Administrative Decision</i>	0	0	Pending Archival Review.	Pending Archival Review.
Photographs and Negatives	<b>Photographs and Negatives</b> - may include identified photographs or negatives of churches, buildings, events, people or places. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases.	Active +	Pending archival review.
Policies Manuals and Statements	<b>Policies Manuals and Statements</b> – may include policy manuals or statements. <i>Administrative Decision</i>	Policy in effect	When superseded	Permanent	Permanent

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Press Releases	<b>Press Releases</b> – official statements or announcements, made by or through the Department of Communications, about the Diocese Houma-Thibodaux. <i>Administrative Decision</i>	2	1	3	Permanent
Procedural Manual	<b>Procedural Manual</b> - provides instructions for day to day business operation. <i>Administrative Decision</i>	Administratively useful	When Superseded +10 years	Destroy 10 years after superseded	Destroy
Publications	<b>Publications</b> – may include directories, parish histories, newsletters, yearbooks, newspapers, brochures and other publications of the Diocese. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases	Permanent	Permanent (2 copies maintained in the Archives)
Scrapbooks	<b>Scrapbooks</b> – a book or album used by an Diocesan entity for pasting in photos, pictures, cuttings, brochures, or other material that documents the entity's special events, achievements or programs. <i>Administrative Decision</i>	Administratively useful	Administrative value ceases.	Active +	Pending archival review
Scripts and Algorithms	<b>Scripts and Algorithms:</b> written instructions for a program. <i>Administrative Decision</i>	Life of the program.	Program is superseded.	Life of the program.	Destroy once program is superseded.
Telephone Logs	<b>Telephone Logs</b> – messages taken to inform an individual someone called them. <i>Administrative Decision</i>	1	0	1	Destroy
Usage Reports	<b>Usage Reports</b> - may include reports on individual internet and firewall usage and activities. <i>Administrative Decision</i>	Administratively Useful.	Administrative value ceases.	Active + until administrative value ceases.	Destroy after administrative value ceases.

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Video Monitoring/ Security Cameras	Video Monitoring/Security Cameras – may include recording media used for the surveillance of property, buildings, or rooms. <i>Administrative Decision</i>			30 days after video has been created.	0	30 days	Destroy 30 days after video has been created.		
Visitor Sign-in Sheet	Visitor Sign-In Sheet – log visitors sign-in/out of when visiting administrative buildings. <i>Administrative Decision</i>			Current Year	1 Year	Current + 1 Year	Destroy after inactive for a year.		
<b>Date</b>	<b>Archivist Approval (Print)</b>	<b>Date</b>	<b>Department Head or Cabinet Secretary Approval (Print)</b>	<b>Date</b>	<b>Finance Representative Approval (Print)</b>	<b>Date</b>	<b>Law Representative Approval (Print)</b>		
8/1	Alex Gaudet	8/1/18	Simon R. ENGRAJA	8/1/18	Glenn J Landry Jr	8/15/18	DANIEL J. WALKER		
<b>Signature</b>		<b>Signature</b>		<b>Signature</b>		<b>Signature</b>			
Alex Gaudet				Glenn J Landry Jr		