






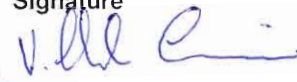


DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Administrative Records				Effective Date	Schedule No. 11-02	Page 1 of 3
Records Series Title	Description	Retention Period			Total Retention	
		Office	Storage	Total		
Annual Reports	Documents the annual activity of a program or department. Submit to archives for review.	3	0	AR	Archival Review	
Budget (office copy)	Annual summary of departments allowed expenditures original submitted to Finance, destroy.	Active+2	0	3	3	
Calendar	May be in digital or paper format, contains information regarding events, appointments, daily business. Retain until administrative usefulness is complete, department directors submit to archives for review.	Active+1	0	2	Archival review for Directors	
Conference, Seminar, and Workshop Records	Information relating to conferences and seminars attended by staff, includes program brochures, flyers, promotional material. Retain until administrative usefulness ceases.	Active	0	0	Destroy	
Correspondence General	Letter, memos, e-mail, etc. between departments, other diocesan organizations, and or the public. Retain for two years in office. Review, retain any correspondence that has ongoing administrative value.	2	1	3	Destroy	
Correspondence Executive/Historic	Letter, memos, e-mail, etc. that documents significant events or decisions, that illustrate the history of the person, position, department, or organization. Retain in office until administrative usefulness is complete, transfer to archives for review.	Active	P	P	Archival review	
Donor Files	Files relating to major donors to the diocese. May include correspondence, financial data, record of donation. Excludes Bishop's Annual Appeal. Retain permanently, submit inactive files to Archives for review.	P	P	P	Permanent	
Grants	Documentation created to track the progress of funded projects. May include application, correspondence, contracts, etc. Retain for 10 years after completion of the terms of the grant. Keep summary report of completion of grant permanently. Transfer to archives for review.	5	5	10	Destroy	




Date <i>4/26/11</i>	Archivist Approval (Print) Ann Boltin	Date	Department Head or Cabinet Secretary Approval (Print) Fr. Than Vu	Date <i>4/26/11</i>	Finance Representative Approval (Print) Joe Ingraham	Date <i>4/26/11</i>	Law Representative Approval (Print) Charles Cusimano
Signature 		Signature 		Signature 		Signature 	

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section		Effective Date	Schedule No.	Page			
Administrative Records			11-02	2 of 2			
Records Series Title	Description	Retention Period			Total Retention		
		Office	Storage	Total			
Job Announcements	Job postings for positions open within departments. Retain until administrative usefulness is complete.	Active+1	0	1	Destroy		
Job Descriptions	Job descriptions for positions within departments and offices. May include information about duties, education requirements, physical requirements, salary scale. Retain until superseded. Submit to archives.	Active	0	AR	Archival Review		
Mailing Lists	Lists of addresses for individuals that do business with the diocese. Retain until administrative usefulness is complete.	Active+1	0	1	Destroy		
Minutes	A written record of a group's meeting. May include parish council minutes, committee minutes, etc. Retain permanently, transfer to archives for review.	2	P	P	Permanent		
Newsletters	Publication created by diocesan departments and distributed within diocese of to the public. Contains articles, news, and information about diocese. Retain one copy permanently, submit to archives for long-term preservation.	1	P	P	Permanent		
Phone Log	Written record of calls made to diocese. May include name, number, date, and subject of call. Retain in office one year or until administrative value ceases.	Active+1	0	2	Destroy		
Policies	Document the policies and procedures for office personnel. Retain until superseded by new policy or administrative value ceases. Submit to Archives for review.	Active	0	AR	Archival review		
Press Releases	Issued by departments concerning news, events, and responses by the diocese. Retain one copy in office three years transfer to Archives for review.	Active+2	0	P	Permanent		
Date	Archivist Approval (Print)	Date	Department Head or Cabinet Secretary Approval (Print)	Date	Finance Representative Approval (Print)	Date	Law Representative Approval (Print)
4/26/11	Ann Boltin		Fr. Than Vu	4/26/11	Joe Ingraham	4/26/11	Charles Cusimano
Signature		Signature		Signature		Signature	
							

DIOCESE OF BATON ROUGE-Records Retention Schedule

Department/Section Administrative Records				Effective Date	Schedule No.	Page
				11-02	3 of 3	
Records Series Title	Description	Retention Period			Total Retention	
		Office	Storage	Total		
Project Files	Files relating to a limited or one-time action of the diocese. (Special fund drive, campaign, etc.) May include correspondence, reports, and data, gathered to document aspects of the project. Retain in office 1 year following completion of project, transfer to Archives for permanent retention.	Active+1	P	P	Permanent	
Reference Files	Files kept for ready access and administrative use, may contain brochures, news clippings, print-outs. Destroy 1 year after administrative value ceases.	Active+1	0	1	Destroy	
Special Event Files	Records of the planning, administration, and follow-up to special events held in the diocese. May include correspondence, programs, flyers, financial records, photographs, clippings, etc. Retain for 3 years then transfer to Archives.	3	P	P	Permanent	
Vendor Files	Files relating to offers of services, equipment, or supplies. May contain brochures, catalogs, company information, and contacts. These files do not contain formal agreements or contracts. Destroy 1 year after administrative value ceases.	Active+1	0	1	Destroy	

Date <i>4/24/11</i>	Archivist Approval (Print) Ann Boltin	Date	Department Head or Cabinet Secretary Approval (Print) Fr. Than Vu	Date <i>4/24/11</i>	Finance Representative Approval (Print) Joe Ingraham	Date <i>4/24/11</i>	Law Representative Approval (Print) Charles Cusimano
Signature 		Signature 		Signature 		Signature 