

Affiliate and Friends Groups

This schedule applies to Column and Stripe, Contemporary Art Society (501c3), Friends of African and African American Art, Friends of Photography, The Musart Society (501c3), The Painting and Drawing Society, Print Club of Cleveland (501c3), Textile Art Alliance (501c3), and Women’s Council.

Custody of the records listed in this schedule varies. Active records may be maintained by the affiliate group and/or museum staff. Financial records of independent 501(c)3 organizations are retained by the group. This schedule applies to all situations. The ultimate repository for historical records of CMA affiliate groups is the museum archives.

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	Acquisition Records	Records of the purchase of works of art as donations to museum collections.	A + 2 years	P	P	

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3	Annual Reports	Detailed reports including statistics, program summaries, and quarterly reports.	A + 2 years	P	P	
4	Board Records	Records of the board of directors including board meeting agendas, minutes, and ancillary materials; Records of the president including correspondence and planning files.	A + 2 years	P	P	
5	Brochures and other Published Material		A	P	P	Route a copy to archives upon distribution.
6	Correspondence	Substantive correspondence documenting policy, procedure, or decision making.	A + 2 years	P	P	Correspondence may be analog or electronic.
7	Event Files	Records of affiliate and friend group events such as menus, guest and invitation lists, and photographs.	A + 2 years	8 years	10 years	
8	Exhibition Records	Records of the development and implementation of exhibitions.	A + 2 years	P	P	

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9	Financial Records		CY + 2	5 years	7 years	All financial records for CMA affiliate groups and 501c3 organizations are retained for seven years. Endowment account statements should be sent to archives by the Affiliate Group Coordinator.
10	Meeting Records	Records of affiliate group meetings including agendas, minutes, presentations, and handouts.	A + 2 years	P	P	
11	Membership Rosters	Lists of affiliate group membership.	A + 2 years	P	P	
12	Newsletters	Printed and electronic newsletters.	A	P	P	Add the Archivist to the distribution list for electronic and printed newsletters.
13	Program Files	Records of the development and implementation of affiliate group programming.	A + 2 years	P	P	
14	Travel Records	Records of affiliate and friend group trips including itineraries, guest lists, photographs, reservation confirmations, and logistical arrangements.	A + 2 years	8 years	10 years	
15	Websites and Blogs	Affiliate and friend group website and blogs.	A	0	A	