

Marketing and Communications

This schedule applies to records in all formats

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2	Annual Reports for your department	Detailed unpublished reports including statistics, program summaries, and quarterly reports	5 years	P	P	Formats change over time. A comprehensive report may not be published each year.

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3	Blogs	A) Substantive blog posts - unique content not available elsewhere such as guest blogs and staff interviews	A	P	P	Archives staff will sample blog posts based on the criteria outlined in the description.
		B) Routine blog posts - recycled content, routine announcements, and links to web content	A	0	A	
4	Board of Trustees clipping book	Book of notable press and social media clippings submitted to the Board of Trustees	A	P	P	Send one copy of each book to archives upon publication.

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5	Clippings and Publications	Clipping clippings from newspapers, electronic sources, and other publications	A	0	A	Significant clippings and publications about CMA exhibitions, events, activities, staff, projects (such as construction and the transformer station), and history should be sent to the library for their clipping files. The library also clips the New York Times, Cleveland Plain Dealer, the Village Voice, Scene, Cleveland Magazine, Time Out New York, Crain's Cleveland Business, the New Yorker, and cleveland.com
6	Electronic Newsletters	e-newsletters sent periodically to members and interested parties	A	0	A	Newsletters contain recycled content and links to other existing content sources

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7	Grant Administrative Files for grants received		A + 5 years	P	P	
8	Interview Primers	Preparatory guides for interviews with the media, mostly prepared for significant interviews given by senior staff	A	P	P	Transfer electronic copies to archives after the conclusion of the interview or annually as a group.
9	Marketing and Communication Plans	Plans detailing the necessary actions to achieve marketing and communication objectives	A	P	P	Transfer electronic copies to archives annually or upon publication
10	Marketing recaps		A	P	P	Transfer electronic copies to archives annually or upon publication
11	Minutes and related materials prepared by your department	Includes staff meeting minutes and agendas	A + 2 years	P	P	Discard informational copies of meeting minutes and related materials NOT created by your department when they are no longer useful

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12	Press Releases and Media Kits	Include press releases, captions, images	A	P	P	Transfer electronic copy to archives upon publication
13	Policy Statements and Procedure Manuals		A	P	P	Transfer electronic copy to archives when published and updated.
14	Research reports	Reports prepared for museum departments based on research projects regarding topics such as visitors, exhibitions, interpretive schemes, and exit surveys	A	P	P	Transfer electronic copy to archives annually or upon publication
15	Social media posts	such as twitter, facebook	A	0	A	A selection of social media posts come to archives as part of the Board clipping book. Public tweets are archived at the Library of Congress
16	Statistics - general attendance	General attendance statistics are compiled by marketing and communications and are stored on the museum intranet	A	P	P	Archives staff will take electronic copies off of the intranet on a regular periodic basis.

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17	Statistics summary	Museum wide statistics stored in an excel spreadsheet on the museum intranet	A	P	P	Archives staff will take electronic copies off of the intranet on a regular periodic basis.
18	Tear sheets	Copies of Ads by creative services or ad agencies				Transfer paper copies of milestone tear sheets to archives annually. Archives staff periodically pull rack cards for permanent retention in archives.
		A) Milestone Tear Sheets - sheets for significant ads relating to milestone events or activities such as the campaign, gallery openings, and anniversaries	A	P	P	
		B) Routine Tear Sheets - Ads of a routine nature relating to events or activities such as special exhibition openings and programs	A	0	A	
19	Website		TBD	TBD	TBD	
20	Website statistics	Monthly dashboard of website statistics	A	P	P	Send report electronically