

**Diocesan Records Series:
Administrative – General**

Record Series	Series No.	Description	Retention	Disposition
Applications	2014.062	Forms seeking permission for a right or privilege: parking permits, camp attendance, scholarships, etc.	3 years. (805 ILCS 410/1-6)	Destroy.
Audio/Visual Materials	XXX	See: Publications (ADMN/P0057).	XXX	XXX
Calendars	2014.063	Schedule of daily events. Does not include executives' (Bishop, Vicar General, Chancellor, CFO) calendars.	Until administrative use ceases; maximum of 2 years.	Destroy.
Certificates of Destruction	2014.064	The form recording the destruction of records after their prescribed retention period.	Permanent.	Transfer to Archives.
Correspondence, Official	2014.065	Policy and program planning, official communication, official statements, discussions relating to strategic initiatives or mission program activities, etc. Also includes substantive correspondence received from such government agencies as the Internal Revenue Service, etc.	Permanent. Keep current year plus 2 in office.	Transfer to Archives.
Correspondence, Routine	2014.066	Includes paper versions of messages, travel arrangements, meetings, appointments, acknowledgements, ordering, transmittals, reminder notices, cover letters, announcements, etc. Excludes correspondence of executive offices (Bishop, Vicar General, Chancellor, CFO).	Until administrative use ceases; maximum of 1 year.	Destroy.
Councils/Boards/Commissions, Non-Diocesan	2014.067	Various non-diocesan consultative bodies (i.e. boards, councils, taskforce, etc.) on which an employee serves. May contain: reports, correspondence, printed materials, etc. May contain subseries (Minutes, Correspondence, etc.) depending on volume.	Until administrative value ceases.	Destroy.
Equipment Files	2014.068	Files created to document the purchase and continuing maintenance of equipment purchased. May include: copies of invoices, purchase orders, operating manuals, etc.	For life of equipment.	Destroy.
Events	2014.069	Record of the planning, administration, and follow-up to events, seminars, workshops, etc. held in the Diocese. May include: correspondence, financial records, photographs, clippings, publicity, a/v materials, etc.	Permanent, pending Archivist review. Keep current year plus 2 in office.	Transfer to Archives.

Record Series	Series No.	Description	Retention	Disposition
Gifts, Tributes & Awards	2014.071	Materials given to the Diocese or a Diocesan official as a gift, tribute or award. May include: certificates, scrapbooks, spiritual bouquets, etc.	Permanent, pending Archivist review. Keep current year plus 2 in office.	Transfer to Archives.
Grants	2014.072	Grant applications and correspondence with granting agencies. May also include documentation of grants awarded: contracts, financial statements, correspondence, reports, etc.	Grants Awarded: Permanent for final accounting and summary documents. Keep current year plus 2 in office. Working Materials/Rejected Applications: 3 years. (805 ILCS 410/1-6)	Transfer to Archives. Destroy.
Meeting Minutes	2014.073	Agendas, minutes, correspondence, working papers of councils, boards, commissions, etc.	Permanent, pending Archivist review.	Transfer to Archives.
Newsletters	XXX	See: Publications (ADMN/P0057).	XXX	XXX
Office Copies	2014.074	Office or personal copies of records where the original item (or official copy) is retained by another office. Includes budget reports, check requests, paid invoices, memorandums, duplications of meeting minutes, reference copies of items already sent to Archives, etc.	Until administrative use ceases; maximum of 1 year.	Destroy.
Organizational Charts	2014.075	Agency/departmental organizational structure.	Permanent.	Transfer to Archives.
Photographic Materials	2014.076	Photographic materials may include photographs, slides, negatives, motion picture films, etc.	Permanent, pending Archivist review.	Transfer to Archives.
Policies & Procedures	2014.077	Records that document the development, revision and promulgation of diocesan policies. May be Diocese-wide or office-specific.	Permanent.	1 copy to Archives for permanent retention. Keep reference copies until administrative use ceases.

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Policies & Procedures: Manuals	2014.077	Manuals detailing personnel policies.	Permanent.	1 copy to Archives for permanent retention. Keep reference copies until administrative use ceases.
Press Releases	2014.079	Press releases issued by a Diocesan office.	Permanent, pending Archivist review. Keep current year plus 2 in office.	Transfer to Archives.
Program Files	2014.080	Working files relevant to ongoing programs.	Permanent, pending Archivist review.	Transfer to Archives.
Project Files	2014.081	Working files relevant to special projects.	Permanent, pending Archivist review.	Transfer to Archives.
Publications	2014.082	Publications (in print, electronic, A/V, etc.) created by a Diocesan office, parish, school, or other agency. Includes videos, newsletters, mailings, books, pamphlets or published/unpublished histories that commemorate specific events, anniversaries or jubilees.	Final Product: Permanent. Working Papers: Until administrative value ceases; maximum of 1 year.	2 copies to Archives for permanent retention. Keep reference copies until administrative use ceases. Destroy.
Scrapbooks	2014.084	A book that includes photographs, newspaper clippings, cards, etc. Documents events and activities held at a parish or school.	Permanent, pending Archivist review.	Transfer to Archives.
Secret Marriage Register	2014.085	Traditional marriage record register for recording Secret Marriages as mandated by Canon Law.	Permanent. (1983 Code C. 1130-1133, C. 490)	Transfer to Archives.
Secret Marriage Supporting Documentation Files	2014.086	May also contain marriage files relating to Secret Marriages. The files may contain permission that the pre-matrimonial investigation be made secretly, promises of secrecy, and traditional marriage investigation documents.	Permanent. (1983 Code C. 1130-1133, C. 490)	Transfer to Archives.

Record Series	Series No.	Description	Retention	Disposition
Statistical Reports	2014.087	Internal reports created to demonstrate changes/trends in projects, financial situations, office activities, mass attendance, etc.	Until administrative use ceases; maximum of 1 year.	Transfer to Archives for review.
Subject Files	2014.088	Reference materials not created by a diocesan office. May include news clippings, brochures, pamphlets, etc.	Until administrative use ceases; maximum of 2 years.	Destroy.
Surveys, Studies & Planning	2014.089	Surveys, studies and planning materials relating to Diocesan issues. May be produced internally or externally.	Permanent, pending Archivist review.	Transfer to Archives for review.
Telephone Logs	2014.090	Records kept of telephone activity. If log pertains to allegations of sexual misconduct with minors, or belongs to employees identified as childcare workers: retain 20 years after claimant reaches age of majority, or, if age is unknown, 30 years. If claimant is legally disabled, the 20-year period does not start until the disability is removed. (735 ILCS 5/13-202.2)	Until administrative use ceases; maximum of 1 year.	Destroy.
Time Capsules	2014.091	A container used as a repository for items (i.e. newspaper, ephemera, coins, mementos, dated documents, etc.) placed in a building or specific geographic location to be opened at a predetermined period of time with the intention of tying the past to the present.	Permanent.	Transfer to Archives.
Vendor Files	2014.092	Files relating to offers of services, equipment or supplies. Informational; does not include formal proposals. May contain catalogs, brochures, etc.	Until administrative use ceases; maximum of 1 year.	Destroy.