

**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. |

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|-------------------------------------|------------|---|--|---|
| 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. |

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| 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. |