# 245-WISCONSIN HISTORICAL SOCIETY

RDA #	RDA Title			Retention	Disposition	PII		
<u>00180000.</u>	SPECIAL PROC	GRAM RECORDS		EVT+5	SHSW	<u>N</u>		
	drawings, poste	cial programs created by the Divisi rs, research notes, background ma pecific programs. Programs may b	aterials, pamphlets/brochure	s, labels, artifact lists, a				
	Retention: these	e program files will be retained for	5 years following the close o	f the first season the pr	ogram is used.			
	RETENTION: E	VENT (End of 1st season of the p	rogram) + 5 years and transf	er to State Historical So	ociety			
0181000.	TOUR RECORE	<u>os</u>		EVT+5	DEST	<u>Y</u>		
		sts of participants, release forms (i o include receipts and payment do		e, and other notes rela	ted to arrangements for	tour		
	RETENTION = I	EVENT (End of season) + 5 years	and destroy confidential					
0182000.	NATIONAL HIS	TORY DAY REGISTRATION FOR	RMS	<u>CR+6</u>	DEST	<u>Y</u>		
	Registrations for regional and state National History Day (NHD) competitions. Registrations contain student and parent contact information and information about the student's NHD project.							
	RETENTION: E	VENT (Creation) + 6 years and de	estroy confidential					
0183000.	NATIONAL HISTORY DAY STUDENT COMPETITION FILES <u>CR+6</u> <u>DEST</u> <u>Y</u>							
	Student project files contain student work submitted as part of Regional or State National History Day competitions and judge comment sheets. The student work is process papers and bibliographies, and these are used to verify project originality and accuracy. Judge comment sheets are retained to clarify any scoring issues that may arise.							
	Files contain student names.							
	RETENTION = I	EVENT (Creation) + 6 years and d	lestroy confidential					
00188000.	PUBLIC LANDS	S PERMITS		<u>P</u>	PERM	<u>Y</u>		
	Permits to conduct field archaeology on all non-Federal public lands under Wis. Stats. § 44.47. Permits contain information about the person/organization conducting the archaeological investigation, location of the proposed work, the type of investigations, the purpose of the investigations, the dates of the field work, and the location where artifacts, images, and associated records will be curated. Forms are signed by the archaeologist requesting the permit, the landowner, and then the State Archaeologist. Each permit is assigned a Public Lands Permits numbers that contains the year the permit was issued and the sequential number of the permit, e.g. PLP 15-021. An excel table is used to track permits that are signed each year.							
	As of January 1, 2016, permits are maintained electronically.							
	Permanent retention is necessary because permit files provide a chain of title for the artifacts that are recovered from public lands and the associated records that are created through the work.							
	RETENTION: Permanent							
Dept #:	<u>/245/</u>	Department Name:	STATE HISTORICA	L SOCIETY OF V	VISCONSIN			
RDA #	RDA Title			Retention	Disposition	PII		
<u>00001000.</u>	COMPLIANCE	CASE FILES		EVT+4	DEST	<u>N</u>		
	historical, archite	ederal or state funds, or requiring f ectural, engineering, cultural or arc erties that are present in the projec	cheological significance. The	federal or state agency	y must attempt to identif	y		
	<b>-</b>	of: project descriptions maps pla						

Records consist of: project descriptions, maps, plans and Historic Preservation Division's review comments and recommendations concerning actions needed to comply with Section 106 of the National Historic Preservation Act (PL 89-665), Wis. Stat. § 44.22, or with other federal or state environmental protection and historic preservation laws. Additionally, these records may contain such documents

## RDA # PII **RDA** Title Retention Disposition and building plans and specifications, facilities master plans, environmental assessments and draft and final environmental impact statements This series may contain plans for secure structures as defined by Wis. Stat. § 101.12(5) which are confidential per Wis. Stat. 101.12(5)(c) RETENTION: EVENT (Annual single audit) + 4 years and destroy confidential HISTORIC AMERICAN BUILDINGS SURVEY (HABS) AND THE HISTORIC AMEF EVT+4 00001A00. SHSW Ν Photographs and drawings pertaining to the Historical Preservation Division's (Division) evaluation of the efforts on properties of historical, architectural, engineering, cultural, or archaeological significance by projects using federal or state funds, or requiring federal or state licenses, permits, authorizations, or in-king support, or that affect human burial sites. Records transferred to the Archives are of two types: 1) duplicate copies of reports about Wisconsin buildings and structures submitted to the Historical American Buildings Survey (HABS) and the Historic American Engineering Records (HAER), and 2) reports or files containing HABS-level and/or HAER-level documentation submitted to the Division in satisfaction of legal agreements pursuant to which the Division was a party. RETENTION: EVENT (Annual single audit) + 4 years and transfer to State Historical Society PERM 00002000. STATE AGENCIES RECORDS FILES Ρ Ν Correspondence with state agencies, appraisal notes and reports, and transmittal forms regarding state government records. This series includes appraisal reports written by archivists that evaluate whether records should be transferred to the state archives or remain at the state archives, and correspondence with agencies concerning issues such as records retention, access to records. sampling techniques. Permanent retention is necessary because this series includes documents which prove SHSW ownership of collections as well as documents the decisions and actions taken on collections. **RETENTION: Permanent** LOCAL GOVERNMENT RECORDS CORRESPONDENCE 00003000. CR+5 SHSW Ν Correspondence with local governments regarding the disposal of public records and transfer of records to the State Archives. The series includes notification from local government regarding the disposal of records and the response of the State Archives. The series also includes transmittal letters for records transferred to or deposited with the State Archives. RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society 00016000. PRESS PRODUCTION FILES EVT+20 DEST Ν This record series contains the "press-ready" materials used by printers to produce Wisconsin Historical Society Press publications. Press ready materials are primarily electronic and can include Quark X-Press documents, fonts, image files (.tiff or .jpg), and Adobe Illustrator files. Electronic files are stored on the SHSW network and on removable media in the production manager's office. RETENTION: EVENT (Publication) + 20 years and destroy 00019000. ADMINISTRATIVE SUBJECT FILE OF THE STATE ARCHIVIST CR+5 SHSW Ν Reports, memoranda, and related correspondence of the State Archivist and administrator of the library-archives division. Series includes records regarding the Division's administration, files on the operation of each section, and subject file on archival issues. RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society 00021000. ADMINISTRATIVE SUBJECT FILES SHSW CR+5 Ν Minutes, reports, correspondence and grant review files of the Board. The Board is established by Executive Order and reviews grant applications for the National Historical Publications and Records Commission (NHPRC). For administrative purposes, the board is attached to the Wisconsin Historical Society. RETENTION = EVENT (Creation) + 5 years and transfer to State Historical Society 00025000. **COLLECTIONS CORRESPONDENCE** CR+5 SHSW Υ Correspondence with donors and potential donors relating to the acquisition of manuscript materials, photographs, and printed materials.

RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society

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## 00028000. CURATOR GENERAL CORRESPONDENCE FILES

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### /245/ STATE HISTORICAL SOCIETY OF WISCONSIN Dept #: **Department Name:** RDA # **RDA** Title Retention Disposition PII General correspondence files of curatorial staff with professionals in other museums, archaeologists, historians, collectors, and the general public concerning donations to the collections, information about artifacts, museum activities, and other related activities. This record series is retained permanently because the objects donated to the SHSW are retained permanently. **RETENTION: Permanent** EVT+5 00030000. **EXHIBIT FILES** SHSW Υ Correspondence, diagrams, drawings, posters, research notes and background material, pamphlets, exhibit labels, lists of artifacts, and clippings related to the preparation of specific museum exhibits. RETENTION: EVENT (Close of exhibit) + 5 years and transfer to State Historical Society 00033000. DIVISION AND DEPUTY ADMINISTRATOR SUBJECT FILES CR+5 SHSW Y Subject files concerning the administration of the Division and special projects related to individual sites. Includes correspondence, reports, reference material, financial data, and statistics. RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society 00034000. DIVISION AND DEPUTY ADMINISTRATOR CORRESPONDENCE CR+5 SHSW Y Correspondence concerning Division administration. Includes correspondence with WHS administrators, site directors, governmental agencies, and the general public. RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society 00038000. STAFF SUBJECT FILES EVT DEST Ν Staff subject files include reference files on site history and operations, brochures, and material collected from similar institutions. RETENTION: EVENT (Superseded) and destroy 00042000. **EXHIBIT LOAN FILES** Ρ PERM Ν All materials related to the loan of Circus World Museum property to other institutions for the purpose of exhibition. Files may include correspondence, contracts, notes, and other tracking materials. Records are retained permanently because collection objects are permanent property of the state and its necessary to maintain information about what happens to objects and archival material while under state ownership. **RETENTION: Permanent** 00044000. LETTER OF INDEMNIFICATION/REPRODUCTION REQUEST EVT+75 DEST <u>Y</u> Letter of indemnification/reproduction request signed by patron when photographic prints are ordered from Circus World Museum. Letter of indemnification states that patron: 1. Agrees to pay all charges for services 2. Will not furnish others with copies of images ordered, 3. Will not alter images significantly without staff permission, and 4. Assumes all responsibility for violation of the rights of ownership, infringement of copyright, or invasion of the rights of privacy or laws of libel resulting from use of material ordered. Letter of indemnification could be used if any legal action is taken resulting from the use of images ordered through Circus World Museum RETENTION: EVENT (Authorization granted) + 75 years and destroy confidential **COLLECTION USE FORMS** 00047000. DEST Y CR+10 This series consists of forms completed by CWM Library users wishing to use CWM collections. This series includes Call Slips which are required to page of collections, daily sign in logs, and annual registration forms. Each of these forms must be completed by anyone wishing to access a collection at CWM Library. RETENTION: EVENT (Creation) + 10 years and destroy confidential 00048000. REFERENCE CORRESPONDENCE CR+5 DEST <u>Y</u> This series provides a record of the reference questions answered by the staff. RETENTION: EVENT (Creation) + 5 years and destroy confidential 00051000. **REHABILITATION TAX CREDIT APPLICATION FILES** DEST <u>Y</u> EVT+5 Files include all documents relating to building rehabilitation projects in which the owner has applied to receive income tax credits.

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RDA #	RDA Title		Retention	Disposition	PII
	Wis. Stat. § 77.28 correspondence b before and after co	6). These projects involve buildi etween owner and State Historic	Internal Revenue Code. A supplemental state in ngs that are listed the National Register of Histor Preservation Office (SHPO); completed applica a drawings; work and material specifications; the ication.	ic Places. The files may in tions; photographs of the b	clude uilding
	retained for that pe		ter the project is completed must be reviewed by duplicates of all files which they keep for 5 years the files for 30 years.		
	RETENTION: EVE	ENT (End of project) + 5 years ar	nd destroy confidential		

#### ARCHEOLOGICAL SITES INVENTORY FORMS 00053000.

This series consists of four different site inventory forms:

1) Wisconsin Archeological Site Inventory Form (HP-06-02P);

2) Wisconsin Archeological Site Short Form (HP-06-03P);

3) Archeological Site Inventory Correction/Update Form (HP-06-01P); and

4) USDA Forest Service Site Form

Information on suspected or confirmed archeological sites in Wisconsin is submitted by archaeologists from various private archaeological consulting firms, state agencies, research, and educational institutions throughout the state. Data from the forms is input into the Wisconsin Historic Property Database system. All forms submitted before January 2005 have been retained and will not be destroyed until data entry is verified. Forms submitted after January 2005 and accompanied by drawings or sketch maps will be placed in the archeological site files (RDA 0059).

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Record series is confidential per Wis. Stat. § 44.48(1)(c) and Wis. Stat. § 157.10(2)(a).

RETENTION: EVENT (Creation) + 4 years and destroy confidential

00057000.	ARCHEOLOGICAL REGULATION AND TAX EXEMPT CASE FILES	Р	PERM	N

Case files for managing archeological preservation covenants and regulating tax exemption status for private property with an archeological site. This function is conducted in compliance with state statues and federal law. If a property has an archeological preservation covenant on it, the fact is entered into the Archeological Sites Inventory Database (part of the Wisconsin Historic Property Database system). Original covenant documents are maintained by the Division but are also recorded by the Register of Deeds. The program is mandated by Wis. Stat. § 70.11(13m).

Permanent retention is necessary because archaeological sites may be subject to permanent easement covenant or similar restriction running.

**RETENTION: Permanent** 

#### 00058000. UNPUBLISHED ARCHEOLOGICAL REPORTS

Reports on archaeological investigations generated as a result of Section 106 of the National Historic Preservation Act, Wis. Stat. § 44.40 and Wis. Stat. § 157.70, compliance projects, as well as survey and planning archaeological State Historic Preservation Office (SHPO) sub-grant projects, projects conducted under the auspices of the Wisconsin Regional Archaeology Project and other archaeological investigations completed by State Historic Preservation staff and others. Surveys are required both by state and federal law in certain circumstances (for example, road building) to determine if an archaeological site exists. The reports must be maintained in order to document if, or when, a survey was conducted as well as to document the survey results pursuant to federal and state statutes. Partial data from these reports are entered in the Archaeological Report Inventory (ARI), part of Wisconsin Historical Preservation Database (WHPD) system, which serves as the index to these reports. If the paper source of record is no longer available, the digital version will become the official record. This digital source of record will be stored in a digital archive in a compliant and sustainable manner. A digital use copy will remain in the WHPD.

Record series is confidential per Wis. Stat. § 44.48(1)(c) and Wis. Stat. § 157.70(2)(a)

RETENTION: EVENT (project completed) + 4 years and transfer to State Historical Society

#### 00059000. **ARCHEOLOGICAL SITE FILES**

Files created and maintained for an archeological site (both land and maritime) after the site has had some level of interpretation. Site files are created for those sites for which there is more than a site form and United State Geographic Services (USGS) map. The Site File may include correspondence, legal documents, site inventory form, maps, drawings, field notes, sketch maps, and photographs.

Permanent retention is necessary because the State Historical Society maintains administrative responsibility for the State's archeological sites in perpetuity, per Wis. Stat. § 44.47(5).

## **RETENTION: Permanent**

<u>00070000.</u>	FIELD REPORTS	<u>P</u>	PERM	<u>Y</u>
9/25/2020				

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RDA #	RDA Title			Retention	Disposition	PII		
		ellection development staff af e collection. The reports usually.						
		n: because the Historical So on about the acquisition of th		permanently, it is necess	sary to permanently reta	in the		
	RETENTION: Permar	nent						
<u>00071A00.</u>	LEAD CARD FILE			<u>P</u>	PERM	<u>Y</u>		
	content information, s	I, email, telephone and perso ubject areas, provenance, ar pondence, and field reports.						
	Prior to 1991 the Lead	d Cards are a paper file, afte	r 1991 the card information	is stored in a database.				
		n: because the Historical So on about the acquisition of th		permanently, it is necess	sary to permanently reta	in the		
	RETENTION: Permar	nent						
<u>00073000.</u>	APPRAISAL REPOR	<u>TS</u>		<u>P</u>	PERM	<u>Y</u>		
	Reports completed after the agreement of a donation of a collection and are used to document the decisions and reasoning for the retention and destruction of different portions of a collection.							
		n: because the Historical So on about the acquisition and			sary to permanently reta	in the		
	RETENTION: Permar	nent						
<u>00074000.</u>	DEED FILES AND OF	RAL HISTORY RELEASES		<u>P</u>	PERM	<u>Y</u>		
	Legal documents transferring ownership and other property rights to the SHSW. The documents detail specific restrictions to use and access or other conditions. These are arranged by donor name. This also includes oral history releases.							
		n: because the Historical So on about the acquisition and		permanently, it is necess	sary to permanently reta	in the		
	RETENTION: Permar	nent						
<u>00077000.</u>	CASE FILES			<u>P</u>	PERM	<u>Y</u>		
	Case files bring together information which helps the archivist understand the collection and is the main finding aid for unprocessed collections. In general, case files were created when a collection had more than one accession, beginning in 1992, anything with an inventory received a case file.							
		ession sheets, inventories, a clippings and pamphlets cont			spects of the collection,	a security		
	RETENTION: Permar	nent						
<u>00078000.</u>	MANUSCRIPT ACCE	SSION FORMS		<u>P</u>	PERM	<u>Y</u>		
	The accession form is one of the official records documenting donations to the SHSW covering manuscripts, photographs, films, and recorded sound collections.							
		ntains the accession number ssion record also acted as a		cription of materials, an	d inventory. In some ins	tances		
		form was discontinued, exc int-out of the entry with a co				o the		
	The paper accession	forms are destroyed after the	ey have been microfilmed.					
	RETENTION: Permar	nent						
<u>00078A00.</u>	MANUSCRIPT ACCE	SSION MASTER LIST		<u>P</u>	PERM	<u>Y</u>		
9/2.5/2.02.0								

## STATE HISTORICAL SOCIETY OF WISCONSIN Dept #: /245/ **Department Name:** RDA # **RDA** Title Retention Disposition PII The accession master list is a summary of all accessions in a calendar year. The primary list is kept by accession number, and for some years there are also lists by donor name, subject, and lists of Wisconsin Center for Film and Theater Research (WCFTR), and Area Research Center (ARC) accessions. The accession master list generally contains the accession number, donor name and contact information, collection title, date and initials of collecting staff, collection size, subject, and from 1952-1957 a collection description. For early years, the accession list may be the only place in which an accession was noted. **RETENTION: Permanent** 00084000. LETTER OF INDEMNIFICATION/REPRODUCTION DEST Υ CR+75 Letter of Indemnification/Reproduction Request signed by patron when photographic prints are ordered from the Visual Materials Archive. Letter of Indemnification state that patron: 1) agrees to pay all charges for services; 2) will not furnish others with copies of images ordered; 3) will not alter images significantly without Visual Materials Archive staff permission; and 4) assumes all responsibility for violation of rights of ownership, infringement of copyright or incasion of the rights of privacy or laws of libel resulting from use of material ordered Letter of Indemnification could be used if any legal action is taken resulting from the use of images ordered through the Visual Materials Archive. RETENTION: EVENT (Creation) + 75 years and destroy confidential 00085000. VISUAL MATERIALS PHOTOGRAPH REPRODUCTION WORK ORDER DEST CR+10 Y Visual Materials order form for photographic reproductions ordered through section. Includes the following information: 1) patron's name; 2) patron's address and phone number; 3) items being reproduced; 4) type of reproduction ordered; 5) reproduction costs; and 6) any use fee charged. RETENTION: EVENT (Creation) + 10 years and destroy confidential **REFERENCE CORRESPONDENCE** 00086000. CR+10 DEST <u>Y</u> Purpose: This series provides a record of the reference questions answered by the staff. Description: Correspondence dealing with reference requests to the Library Archives Division concerning the holdings of the Historical Society. RETENTION: EVENT (Creation) + 10 years and destroy confidential EVT 00087000. **REFERENCE ARCHIVIST SUBJECT FILES** DEST Ν General file compiled by SHSW reference staff. This series contains background information on copyright issues, monthly reports, project requests, and correspondence and memoranda with archive staff. RETENTION: EVENT (Superseded) and destroy 00088000. **COLLECTIONS FILES** Ρ PERM Y Archives reference staff created this series to gather information about collections. This series is similar to the case file (RDA 245/0077) but contains legal information not found elsewhere. This series contains pertinent information about a collection such as correspondence, letters asking permission to use, letters and agreements granting access to restricted and confidential material, and legal information about the collection. **RETENTION: Permanent** 00089000. CALL SLIPS CR+10 DEST <u>Y</u> Purpose: Call slips are required for paging of collections. Description: Call slips are required by patrons to use a collection and contain the following information: name of patron, series call number, series title, boxes needed, and date. Requests are created via Aeon software and printed off during the reference request for box tracking purposes. The digital records are official records. Records contain confidential information as defined under Wis. Stat.§ 43.30. RETENTION: EVENT (Creation) + 10 years and destroy confidential 00090000. ANNUAL REGISTRATION FORMS CR+10 DEST <u>Y</u> Purpose: The series allows the reference staff to gather information about patrons for statistical purposes and contains addresses and

Dept #:	<u>/245/</u>	Department Name:	STATE HISTORICAL	SOCIETY OF W	<u>/ISCONSIN</u>			
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	information: date,	ns fill out an online registration for name, addresses (home and loc rules of the Archives Reference	al), institutional association, st					
	Records contain c	confidential information as defined	d under Wis. Stat. § 43.30.					
	RETENTION: EVE	ENT (Creation) + 10 years and de	estroy confidential					
00091000.	DAILY SIGN-IN L	<u>OG</u>		<u>CR+10</u>	DEST	<u>N</u>		
	Purpose: The dail compile statistical	y sign-in log tracks time spent by information.	researchers in the Archives R	Research Room and a	allows the reference sta	ff to		
	Description: The c	laily sign-in log contains the date	, patron's name, and time spe	nt in the Research R	oom.			
	RETENTION: EVE	ENT (Creation) + 10 years and de	estroy confidential					
00092000.	AREA RESEARC	H CENTER TRANSFER LOG		<u>CR+10</u>	DEST	<u>N</u>		
	Tracking information for the Area Research Center (ARC) transfer program. Includes collection information, call number, shipment (sent and received dates), extent, and patron information.							
	Bay, La Crosse, N	ch Center network transfers archi Iilwaukee, Oshkosh, Parkside, P rthern Great Lakes Visitor Center	latteville, River Falls, Stevens					
	RETENTION: EVE	ENT (Creation) + 10 years and de	estroy					
00092A00.	AREA RESEARC	H CENTER TRANSFER FORMS	3	<u>EVT+10</u>	DEST	<u>N</u>		
	Paper forms used to track WHS collections transferred to Area Research Centers (ARCs). Forms list collection title, call number, date shipped, and extent of material transferred.							
	RETENTION: EVE	ENT (Collection return) + 10 year	s and destroy					
00095000.	CONTRACT AND	PROJECT RECORDS		EVT+7	DEST	<u>Y</u>		
	Purpose: this series provides a record of conservation work ordered and completed by conservation lab staff.							
		act and project records include of a conservation work.	ontracts, correspondence, dail	ly work logs, and wor	k orders relating to all ir	i-house		
	RETENTION: EVE	ENT (Close of project) + 7 years	and destroy confidential					
00096000.		E FILES		<u>CR+5</u>	SHSW	<u>N</u>		
	Purpose: this series is required to maintain administrative accountability over the conservation lab's work.							
	Description: subje	ect-based files including budget r	ecords, special project and gra	ant files, and referend	e materials.			
	RETENTION: EVE	ENT (Creation) + 5 years and trai	nsfer to State Historical Societ	ty				
00097000.	ADMINISTRATIV	E CORRESPONDENCE		<u>CR+3</u>	SHSW	<u>Y</u>		
	Purpose: this series provides an overview of conservation techniques and advancements in the field.							
	Description: general incoming and outgoing correspondence concerning a variety of topics not related to specific conservation contract work.							
	Correspondence r	elated to conservation lab work is	s maintained in the series "cor	nservation lab contra	ct and project needs" (R	DA 95).		
	RETENTION: EVE	ENT (Creation) + 3 years and trai	nsfer to State Historical Societ	ty				
00100000.	LOCAL GOVERN	MENT RECORDS PERMANEN	T PROGRAM DEVELOPMEN	TF <u>CR+7</u>	SHSW	<u>N</u>		
		ion packets for the legislature, pu eeting minutes regarding the dev			nd State Historical Reco	ords		
	RETENTION: EVE	ENT (Creation) + 7 years and trai	nsfer to State Historical Societ	ty				
<u>00101000.</u>	LOCAL GOVERN	MENT RECORDS GENERAL S	CHEDULES DEVELOPMENT	FII EVT+10	DEST	<u>N</u>		
9/25/2020								

## PII RDA # **RDA** Title Retention Disposition This series consists of correspondence about the development of general records schedules with associations and advisory committees for local government officials (e.g. treasurers and register of deeds). RETENTION: EVENT (Schedule complete) + 10 years and destroy SHSW 00104000. HISTORY OF WISCONSIN PROJECT FILES EVT+1 Ν Administrative files related to the planning, publicity, awards, and budget for the History of Wisconsin project. Also includes agreements with contributors and authors for the project. RETENTION: EVENT (Close of project) + 1 year and transfer to State Historical Society 00105000. PUBLICATION AND RESEARCH PROJECT FILES EVT+10 SHSW Ν The files deal with the publications of the Wisconsin Historical Society Press. Included are reviews, copyright documentation, permissions, correspondence dealing with the development of the publication, photographs, and donor files. RETENTION: EVENT (Publication) + 10 years and transfer to State Historical Society 00106000. PUBLICATION AND RESEARCH PROJECT WORKING FILES EVT+10 DEST Ν These files deal with the publications of the Wisconsin Historical Society Press. Included are routine correspondence, production specifications, research notes, and related material. RETENTION: EVENT (Publication) + 10 years and destroy 00111000. LOCAL HISTORICAL SOCIETY FILES CR+10 SHSW Ν These files document the establishment of local historical societies and their activities and interactions with Field Services. One function of this office is to document the history of these volunteer organizations, as well as to develop a good working relationship with the volunteers throughout the state and promote the various programs. These records include correspondence, by-laws, articles of incorporation, and annual reports filed under Wis, Stats, § 44.03 of each local historical society. It may also include material produced by the local historical society including brochures, pamphlets, publications, and reports. RETENTION: EVENT (Creation) + 10 years and transfer to State Historical Society 00113000. MINUTES OF THE COUNCIL OF LOCAL HISTORY AND ITS SUBCOMMITTEES CR+10 SHSW Ν Minutes and agendas of the council and various subcommittees. RETENTION: EVENT (Creation) + 10 years and transfer to State Historical Society 00114000. **REUBEN GOLD THWAITES AWARD FILES** CR+10 DEST Ν Award files for the Reuben Gold Thwaites Trophy which is presented annually to one affiliated historical society for continued excellence for its overall service to its community over a period of at least five years. Award files include nomination forms and narratives, correspondence, and press releases. RETENTION: EVENT (Creation) + 10 years and destroy **CURATOR REFERENCE FILES** 00121000. EVT DEST Ν This record series contains research and reference materials relating to the care and management of artifacts. These records were created and maintained to provide guick reference for curatorial staff. RETENTION: EVENT (Superseded) and destroy 00124000. **ACQUISITION LEAD FILES** Ρ PERM Υ This series contains information about items offered for donation or purchase to the SHSW and/or any historic site. May include photographs of the item, correspondence with the item's owner, and supporting documentation. Because the SHSW acquires items for permanent preservation, the supporting documentation about these items must be retained permanently.

STATE HISTORICAL SOCIETY OF WISCONSIN

**RETENTION: Permanent** 

Dept #:

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**Department Name:** 

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RDA #	RDA Title	Retention	Disposition	PII				
<u>00127000.</u>	NEW PRODUCT FILE	<u>EVT+5</u>	<u>SHSW</u>	<u>N</u>				
	Artwork and designs of merchandise created by DMI product development including correspondence with		ncludes records related	d to				
	RETENTION: EVENT (Item no longer carried in store	e) + 5 years and transfer to State Historical Socie	ty					
00128A00.	PRODUCT INVENTORIES	<u>CR+3</u>	DEST	<u>N</u>				
	Store and food service monthly and yearly product in	oventories used to track past sales and trends.						
	RETENTION: EVENT (Creation) + 3 years and destr	roy confidential						
<u>00129000.</u>	LICENSE AGREEMENTS	<u>EVT+10</u>	DEST	<u>Y</u>				
	Completed contract allowing outside parties to produce licensed merchandise which uses State Historical Society of Wisconsin controlled images and artifacts.							
	RETENTION: EVENT (End of agreement) + 10 years	s and destroy confidential						
00133000.	LEASE AND MANAGEMENT AGREEMENT	<u>P</u>	PERM	<u>N</u>				
	The lease and management agreement between Circus World Museum and the State Historical Society of Wisconsin.							
	Permanent retention is necessary because the SHSN documentation to this relationship must be maintained		ationship and the back	ground				
	RETENTION: Permanent							
0136000.	CIRCUS PARADE FILES	<u>EVT+3</u>	<u>SHSW</u>	<u>N</u>				
	This record series contains records related to the creation of all parade activities. They include documentation relating to clowns, budgeting, ideas and parade offers, organization of parade units, organization for mounted units, parade route and order, publicity, showground coordination, train activity, wardrobe, and organization of workers and volunteers. It also includes the contracts and negotiation for wild animal features, carriages, horses for dignitaries, horse teams, musical groups, and individuals.							
	This record series also includes records for the Grea internal and external parties, negotiations with the Ci		<b>U</b> 1	with both				
	This RDA covers records which were previously sche	eduled under RDA00050.						
	RETENTION: EVENT (Parade held) + 3 years and tr	ransfer to State Historical Society						
00137000.	EDUCATIONAL MATERIAL DEVELOPMENT FILE	<u>S <u>EVT+10</u></u>	SHSW	<u>N</u>				
	Records related to projects created and managed by and media creation. Records include, but are not lim documents.	•						
	RETENTION: EVENT (End of project) + 10 years an	d transfer to State Historical Society						
00139000.	SUBJECT FILES	<u>EVT+0/1</u>	DEST	<u>N</u>				
	Subject files created and used by the Office of School	ol Services as reference for research and publicat	ion projects.					
	RETENTION = EVENT (Superseded) + 1 day and de	estroy						
00140000.	ARTWORK AND ILLUSTRATIONS	<u>CR+10</u>	DEST	N				
	Original artwork and illustrations used for any purpos	se in various Office of School Services products.						
	RETENTION: EVENT (Creation) + 10 years and des	troy						
00142000.	BOARD OF CURATORS ELECTION BALLOTS	<u>CR+1</u>	DEST	<u>Y</u>				
	Official ballots for election of the Wisconsin Historica correspondence are governed by RDA 245/0012 (Bc		in comments or attache	ed				
	RETENTION: EVENT (Creation) + 1 year and destro	by confidential						
00149000.	SENIOR MANAGEMENT ADMINISTRATIVE SUBJ	ECT FILES CR+10	SHSW	<u>N</u>				
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	decision-making	ting to topics of interest to the adr process at the highest level of ag and management, memos and cli	ency management as well as			rmation	
	Senior managem	nent includes the Director, Deputy	Director, CIO, Division heads	and Division deputie	S.		
	RETENTION: EV	/ENT (Creation) + 10 years and tr	ransfer to State Historical Soci	ety			
<u>00150000.</u>	PROJECT FILES	S-LIBRARY-ARCHIVES		EVT+1	SHSW	<u>N</u>	
		various project managers within t development projects.	he Library-Archives document	ing significant collect	ing, processing, catalogi	ing, and	
	** State Archive F	Preservation Storage Facility - es	timated completion, 2018.				
	RETENTION: EV	/ENT (Construction of SAPF**) +	1 year and transfer to State Hi	istorical Society			
<u>00157000.</u>	HISTORIC BUIL	DING SITES FILES		<u>P</u>	PERM	<u>N</u>	
	correspondence, documents are us	d maintained for a historic building legal documents, newspaper clip sed to create/update records in th se system. AHI serves as an inde	ppings, National Register quest ne Architectural and History Inv	tionnaires, maps, dra	wings and photographs.	These	
	Note: Selected fil	les may have confidential status a	as outlined by Section 304 of th	ne National Historic F	Preservation Act.		
	Permanent retent	tion is necessary because to trac	k the care and conditions of his	storically important b	uildings.		
	RETENTION: Pe	ermanent					
00158000.	HISTORIC BUIL	DING COVENANTS		<u>P</u>	PERM	<u>N</u>	
	Restrictive covenants and preservation agreements between property owners and the State Historical Society of Wisconsin. The fact that a building or property has a covenant on it is entered into the Wisconsin Historic Property Database system. The original documents are maintained by the Division of Historic Preservation-Public History but are also recorded by the Register of Deeds. They are maintained permanently.						
	Permanent retent	tion is necessary because covena	ants are in effect for perpetuity				
	RETENTION: Pe	ermanent					
<u>00159000.</u>	HOMEOWNERS	TAX CREDIT APPLICATION FI	LES	EVT+5	DEST	<u>Y</u>	
	Credits. These ta Homeowners Tax Historic Places. T applications; pho	documents relating to building reh ax incentives are available pursua x Credit is available in Chapter H Fhe files may include corresponde tographs of the building before ar ad the program's review of the app	nt to the Wisconsin Departmen S 3. These projects involve bui ence between owner and State nd after completion of project;	nt of Revenue rules. Ildings that are on or Historic Preservatio	A supplemental state eligible for the State Reg n Office (SHPO); comple	gister of	
	Any changes made to the property for five years after the project is completed must be reviewed by SHPO, which is why files are retained for that period.						
	RETENTION: EV	/ENT (End of project) + 5 years a	nd destroy confidential				
00161000.	GENEALOGY C	LASS REGISTRATION FORMS		EVT+1	DEST	<u>Y</u>	
		d by individuals for the purpose of credit card numbers. Secondary u				contact	
	This series conta	ins credit card information which	is confidential per Wis. Stat. §	19.36 (13).			
	RETENTION: EV	/ENT(Date form completed) + 1 y	ear and destroy confidential				
<u>00163000.</u>	CASE FILES			<u>P</u>	PERM	<u>Y</u>	
	reports, and resto	il the history of museum collectior oration and conservation reports. e each item in the collection has r	These records are retained pe	ermanently to ensure	that Museum has a com	nplete	

Files also include accession records, deaccession records, Collections Committee minutes, incoming and outgoing loan records, and records pertaining to collections research and access.

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	These records provide legal proof of collection ow	mership therefore must be retained permanently.					
	RETENTION: Permanent						
<u>00164000.</u>	SITE POLICIES AND PROCEDURES	<u>EVT+5</u>	DEST	<u>N</u>			
	Policies and procedures governing the operation, may be authored by site directors or division admi	maintenance, and staffing of Historic sites and musinistrators.	eums. Policies and proc	edures			
	RETENTION: EVENT (Superseded) + 5 years and	d destroy					
00165000.	SITE DIRECTOR'S CORRESPONDENCE AND N	MEMOS <u>CR+5</u>	<u>SHSW</u>	<u>Y</u>			
	Business-related correspondence and memos of t	the site director related to management of the histor	ic site.				
	RETENTION: EVENT (Creation) + 5 years and tra	ansfer to State Historical Society					
<u>00166000.</u>	DIVISION MEETINGS	<u>CR+10</u>	DEST	<u>N</u>			
	including all division staff, and meetings of staff at	, but not limited to, division management team meet sites/museums. Meeting files include the agenda a deputy division administrator maintains the official o o longer needed.	nd any attached/related	material			
	RETENTION: EVENT (Creation) + 10 years and c	lestroy					
00167000.	LIVING HISTORY RECORDS	EVT+5	<u>SHSW</u>	<u>N</u>			
	Reference files on individuals portrayed at historic sites. Files include, but are not limited to, biographical information on the individual(s) portrayed, demographic information, and background on the historic time period in question.						
	RETENTION: EVENT (Individual no longer portrag	yed) + 5 years and transfer to State Historical Socie	ty				
<u>00168000.</u>	ATTENDANCE REPORTS	<u>CR+5</u>	DEST	<u>N</u>			
	Attendance reports, and scattered supplemental information, created by individual sites and the division as a whole. Reports are used to understand and track attendance patterns and plan for staffing and supply needs.						
	RETENTION: EVENT (Creation) + 5 years and de	estroy					
<u>00168A00.</u>	ONGOING ATTENDANCE TALLY	<u>P</u>	PERM	<u>N</u>			
	An ongoing tally of sites and museum attendance updated continually, used to show long term trends in attendance.						
	Permanent retention is necessary to illustrate and	track site attendance over time. Information is used	I for long term planning.				
	RETENTION: Permanent						
00169000.	MARKETING CORRESPONDENCE	<u>CR+5</u>	DEST	<u>Y</u>			
	Correspondence pertaining to the marketing of historic sites. Series may include, but is not limited to, correspondence with members of the media, site directors, SHSW staff, and historic sites in other states.						
	RETENTION: EVENT (Creation) + 5 years and de	estroy confidential					
<u>00170000.</u>	SITE HISTORY FILES	<u>EVT+0/1</u>	SHSW	<u>N</u>			
	Research files, background, and other collected materials related the history of the site and the people/families/buildings represented there. Files may include correspondence, articles, interviews, photographs, and any other collected items.						
	RETENTION: EVENT (Closure of site) + 1 day an	d transfer to State Historical Society					
<u>00171000.</u>	SITE DIRECTOR'S SUBJECT FILES	<u>CR+15</u>	<u>SHSW</u>	<u>N</u>			
	Subject files maintained by site directors on topics related to the administration of historic sites. Includes, but is not limited to, site and/or museum management information and tourism files.						
	RETENTION: EVENT (Creation) + 15 years and to						
<u>00172000.</u>	MARKETING / PUBLICITY FILES	<u>EVT+5</u>	SHSW	<u>N</u>			
	Publicity material created by the Division to marke	et sites and museums. Includes, but is not limited to,	photographs, brochure	s, videos,			
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## /245/ STATE HISTORICAL SOCIETY OF WISCONSIN Dept #: **Department Name:** RDA # PII **RDA** Title Retention Disposition flyers, mailings, sample ads/publicity materials, event-specific material, press releases, and newsletters. Although the Division uses Facebook, YouTube, and Twitter, the information posted there is considered copies. The source files for these social media sites are described above and covered by this RDA. RETENTION: EVENT (No longer used) + 5 years and transfer to State Historical Society 00174000. TREATMENT RECORDS Ρ PERM Ν Treatment records document the condition of an item when it arrives at the conservation lab for treatment though photographs and a condition report. Also documented are the specific conservation treatments performed on an item. Permanent retention is necessary because the items treated by the conservation lab are retained permanently by the WHS, and documentation is needed for the life of the treated item. It is necessary to know what work was done on these items in case a treatment needs to be reversed. **RETENTION: Permanent** 00175000. **USER STUDY FINAL REPORTS** CR+2 SHSW Ν Final reports created using data gathered during Library-Archives user studies. RETENTION: EVENT (Creation) + 2 years and transfer to State Historical Society 00175A00. USER STUDY RESEARCH AND DATA EVT+2 DEST Ν Survey forms and collected data gathered during Library-Archives user studies. Includes completed forms and any databases created to analyze collected information. This series also includes background research materials and notes. RETENTION: EVENT (After final report issued) + 2 years and destroy 00176000. **HISTORICAL MARKERS - APPROVED** CR+5 SHSW Ν Includes marker application, research material, photographs, and correspondence with applicants concerning the proposal, approval, and preparation of historical markers. RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society 00176A00. **HISTORICAL MARKERS - NOT APPROVED** DEST CR+5 Ν Includes marker application, research material, photographs, and correspondence with applicants concerning the proposal of historical markers RETENTION: EVENT (Creation) + 5 years and destroy confidential 00177000. **COLLECTIONS COMMITTEE** Ρ PFRM Y Agendas, meeting minutes, appraisal documents, and other material distributed to members of the collections committee for use in acquisitions decision making. These records also document activities with collections. The collections committee covers collecting at all sites the WHS operates. Permanent retention is necessary because this series documents decisions about collections the WHS retains permanently. **RETENTION: Permanent** 00178000. **CERTIFIED LOCAL GOVERNMENT PROGRAM** CR+5 DEST Ν Records of the Certified Local Government Program, a preservation partnership between local, state and national governments focused on promoting historic preservation at the grass roots level. The program is jointly administered by the National Park Service (NPS) and the State Historic Preservation Offices (SHPOs) in each state, with each local community working through a certification process to become recognized as a Certified Local Government (CLG). Records include annual reports of the CLG's; meeting agendas and minutes submitted to the SHPO for reference purposes; and grant records including applications and notice of awards. Note: the grant documentation maintained by the program office is for reference purposes only, the National Parks Service is responsible for the retention of official records related to the grant program. RETENTION: EVENT (Creation) + 5 years and destroy confidential 00180000. LIBRARY REFERENCE CORRESPONDENCE CR+1 DEST <u>Y</u>

Correspondence dealing with reference requests to the library concerning the holdings of the State Historical Society of Wisconsin.

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	RETENTION: EVEN	NT (Creation) + 1 year and dest	troy confidential					
<u>00185000.</u>	CERTIFIED ARCHI	EOLOGIST LIST FILES		<u>CR+1</u>	DEST	<u>Y</u>		
	As required by Wis. Stats. § 157.70(1)(i) and HS 2.04(6), the certified archeologist list contains archaeologists approved by the Director of the Wisconsin Historical Society to excavate human burial sites. These archaeologists have agreed to provide consulting services to prospective clients.							
	These series consist of curriculum vitaes for certified archaeologists.							
	RETENTION: EVENT (Creation) +1 year and destroy confidential							
<u>00186000.</u>	BURIAL OFFICE R	ECORDS		<u>P</u>	PERM	<u>N</u>		
	Records related to the excavation of human remains at specific burial sites. Records may include reports, field notes, maps, photographs, and permission to disturb burial sites, and information about the disposition of remains.							
	Permanent retention is specified under HS 2.10							
	RETENTION: Perm	anent						
<u>00187000.</u>	PRESS AND PUBL	ICITY FILES		<u>CR+5</u>	<u>SHSW</u>	<u>N</u>		
	Newspaper clippings, brochures, posters, and related promotional material for the Division of Historic Preservation-Public History. Includes material related to archeology month and historic preservation month.							

RETENTION: EVENT (Creation) + 5 years and transfer to State Historical Society