# 245-WISCONSIN HISTORICAL SOCIETY

*Dept #* *Department Name*

| *RDA #* | *RDA Title* | *Retention* | *Disposition* | *PII* |
|---|---|---|---|---|
| **00181000.** | **TOUR RECORDS** | **EVT+5** | **DEST** | **Y** |

Registrations, lists of participants, release forms (if applicable), correspondence, and other documentation related to arrangements for tour groups. May also include receipts and payment documentation.

RETENTION = EVENT (End of season) + 5 years and destroy confidential

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| **00182000.** | **NATIONAL HISTORY DAY REGISTRATION FORMS** | **EVT+6** | **DEST** | **Y** |

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: EVENT (Date of competition) + 6 years and destroy confidential

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| **00188000.** | **PUBLIC LANDS PERMITS** | **P** | **PERM** | **Y** |

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 #* ***/245/*** *Department Name* **STATE HISTORICAL SOCIETY OF WISCONSIN**

| *RDA #* | *RDA Title* | *Retention* | *Disposition* | *PII* |
|---|---|---|---|---|
| **00001000.** | **COMPLIANCE CASE FILES** | **EVT+4** | **DEST** | **N** |

Projects using federal or state funds, or requiring federal licenses or permits, but be evaluated to consider their effects on properties of historical, architectural, engineering, cultural or archeological significance. The federal or state agency must attempt to identify significant properties that are present in the project area and attempt to avoid or minimize adverse effects on such properties.

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 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

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| **00001A00.** | **HISTORIC AMERICAN BUILDINGS SURVEY (HABS) AND THE HISTORIC AMEF** | **EVT+4** | **SHSW** | **N** |

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

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| **00002000.** | **STATE AGENCY RECORDS FILES** | **P** | **PERM** | **N** |

| RDA # | RDA Title | Retention | Disposition | PII |
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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, and 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

**00003000. LOCAL GOVERNMENT RECORDS CORRESPONDENCE** — EVT+5 — SHSW — N

Correspondence with local governments regarding the disposal of public records and transfer of records to the State Archives. The series includes notification from local governments 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 (date correspondence sent or reieved) + 5 years and transfer to State Historical Society

**00016000. PRESS PRODUCTION FILES** — EVT+20 — DEST — N

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.

RETENTION: EVENT (Date used) + 20 years and destroy

**00025000. COLLECTIONS CORRESPONDENCE** — EVT+5 — SHSW — Y

Correspondence with donors and potential donors relating to the acquisition of manuscript materials, photographs, artifacts, and printed materials. These records do not apply to records which would fall under facilities GRS FAC00007.

RETENTION: EVENT (date of aquisition or denial) + 5 years and transfer to State Historical Society

**00030000. EXHIBIT FILES** — EVT+5 — SHSW — Y

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

**00038000. STAFF SUBJECT FILES** — EVT+0/1 — DEST — N

Staff subject files include reference files on site history and operations, brochures, and material collected from similar institutions.

RETENTION: EVENT (Superseded or no longer needed) + 1 month and destroy

**00042000. EXHIBIT LOAN FILES** — P — PERM — N

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 it is 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 — Y

Letter of indemnification/reproduction request signed by patron when photographic prints are ordered from Circus World Museum or visual materials. Letter of indemnification/reproduction states that person: 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.

Retention justification: Letter of indemnification could be used if any legal action is taken resulting from the use of images ordered through Circus World Museum or visual materials.

RETENTION: EVENT (Authorization granted) + 75 years and destroy confidential

**00051000. REHABILITATION TAX CREDIT APPLICATION FILES** — EVT+5 — DEST — Y

Files include all documents relating to building rehabilitation projects in which the owner has applied to receive income tax credits. These tax incentives are available pursuant to the Internal Revenue Code. A supplemental state income tax credit is available under Wis. Stat. § 77.28(6). These projects involve buildings that are listed the National Register of Historic Places. The files may include correspondence between owner and State Historic Preservation Office (SHPO); completed applications; photographs of the building before and after completion of project; construction drawings; work and material specifications; the program's view of the applications; the National Park Service's final review of the application.

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. National Park Service has duplicates of all files which they keep for 5 years after the project is completed and then transfer to the Federal Archives, which holds the files for 30 years.

RETENTION: EVENT (End of project) + 5 years and destroy confidential

**00053000. ARCHEOLOGICAL SITES INVENTORY FORMS** CR+4 DEST Y

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).

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** P 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** EVT+4 SHSW Y

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** P PERM N

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 Service (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

**00070000. FIELD REPORTS** P PERM Y

Reports created by collection development staff after visiting potential donors. Reports include information on size, subject, structure, and provenance of the collection. The reports usually include some appraisal information for evaluating the collection quality. Reports are filed chronologically.

Permanent justification: The Historical Society retains its collections permanently, therefore it is necessary to permanently retain the background information about the acquisition of these collections.

RETENTION: Permanent

**00071A00. LEAD CARD FILE** P PERM Y

This series tracks mail, email, telephone, and personal contacts with donors. It includes donor contact information, collection size, content information, subject areas, provenance, and bibliographic information. The lead card file also serves as an index to appraisal reports, donor correspondence, and field reports.

Permanent justification: The Historical Society retains its collections permanently, therefore it is necessary to permanently retain the background information about the acquisition of these collections.

RETENTION: Permanent

**00073000. APPRAISAL REPORTS** P PERM Y

Reports completed after the agreement of a donation of collection which are used to document the decisions and reasoning for the retention and destruction of different portions of a collection.

Permanent justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and handling of these collections.

RETENTION: Permanent

**00074000. DEED FILES AND ORAL HISTORY RELEASES** P PERM Y

Legal documents transferring ownership and other property rights to the State Historical Society of Wisconsin. The documents detail specific restrictions to the use, access, or other conditions related to acquired collections. This also includes oral history releases.

Permanent justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and use of these collections.

RETENTION: Permanent

**00077000. CASE FILES** P PERM Y

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 list received a case file. These files contain accession sheets, inventories, appraisal reports, correspondence which explains aspects of the collection, a security copy of register, and clippings and pamphlets containing background information.

Permanent justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and use of these collections.

RETENTION: Permanent

**00078000. MANUSCRIPT ACCESSION FORMS** P PERM Y

The accession form is one of the official records documenting donations to the State Historical Society of Wisconsin covering manuscripts, photographs, films, and recorded sound collections. This record series contains the accession number, donor name, address, description of materials, and inventory. In some instances, prior to 1988, the accession record also acted as a deed of gift. In 1992, the accession form was discontinued, except for photo and film collections, and the information is entered directly into the archives catalog. A print-out of the entry with a copy of the inventory is kept in the case file (RDA 245/0077).

Permanent justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and use of these collections.

RETENTION: Permanent

| RDA # | RDA Title | Retention | Disposition | PII |
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| 00078A00. | MANUSCRIPT ACCESSION MASTER LIST | P | PERM | Y |

The accession number 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 and Area Research Centers accessions. The accession master list generally contains the accession number, donor name and donor contact information, collection title, date and initials of collecting staff, collections size, subject, and from 1952-1957, a collection description. For early years, the accession log may be the only place in which an accession was noted.

Retention justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and use of these collections.

RETENTION: Permanent

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| 00085000. | VISUAL MATERIALS PHOTOGRAPH REPRODUCTION WORK ORDER | EVT+10 | DEST | Y |

Visual materials order form for photographic reproductions. Includes the following information: Patron's name, patron's address and phone number, items being reproduced, type of reproduction ordered, reproduction costs, and any use fee charged.

RETENTION: EVENT (date requested) + 10 years and destroy confidential

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| 00086000. | REFERENCE CORRESPONDENCE | EVT+10 | DEST | Y |

This series provides a record of the reference questions answered by the staff. This includes correspondence dealing with reference requests to the Library Archives Division concerning the holdings of the Historical Society.

RETENTION: EVENT (date received) + 10 years and destroy confidential

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| 00088000. | COLLECTIONS FILES | P | PERM | Y |

Archives reference staff created this series to gather information about collections. This series is similar to 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 materials, and legal information about the collection.

Permanent justification: The Historical Society retains its collections permanently, so it is necessary to permanently retain the background information about the acquisition and use of these collections.

RETENTION: Permanent

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| 00089000. | CALL SLIPS | CR+10 | DEST | Y |

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

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| 00090000. | ANNUAL REGISTRATION FORMS | CR+10 | DEST | Y |

Purpose: The series allows the reference staff to gather information about patrons for statistical purposes and contains addresses and telephone information in case the staff needs to contact the patron.

Description: Patrons fill out an online registration form once in a calendar year via Aeon software. The forms contain the following information: date, name, addresses (home and local), institutional association, status, subject of study, identification, purpose of research, and the rules of the Archives Reference Room.

Records contain confidential information as defined under Wis. Stat. § 43.30.

RETENTION: EVENT (Creation) + 10 years and destroy confidential

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| 00091000. | DAILY SIGN-IN LOG | CR+10 | DEST | Y |

The daily sign-in log tracks time spent by researchers in the Archives reading room and allows the reference staff to compile statistical information. It contains the date, patron's name, and time spent in the reading room.

| RDA # | RDA Title | Retention | Disposition | PII |
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RETENTION: EVENT (Creation) + 10 years and destroy confidential

**00092000. AREA RESEARCH CENTER TRANSFER PROGRAM** — EVT+10 — DEST — N

Tracking information for the Area Research Center (ARC) transfer program. Includes collection information, call number, shipment (sent and received dates), extent, and patron information. The Area Research Center network transfers archival material between repositories on UW System campuses at Eau Claire, Green Bay, La Crosse, Milwaukee, Oshkosh, Parkside, Platteville, River Falls, Stevens Point, Stout, Superior, and Whitewater. There is also an ARC at the Northern Great Lakes Visitor Center in Ashland.

RETENTION: EVENT (Date of transfer) + 10 years and destroy

**00092A00. AREA RESEARCH CENTER TRANSFER FORMS** — EVT+10 — DEST — N

Forms used to track the State Historical Society of Wisconsin's collections transferred to area research centers. Forms lists collection title, call number, date shipped, and extent of material transferred.

RETENTION: EVENT (Collection return) + 10 years and destroy

**00095000. CONTRACT AND PROJECT RECORDS** — EVT+7 — DEST — Y

This series provides a record of conservation work ordered and completed by conservation lab staff. Contract and project records include contracts, correspondence, daily work logs, and work orders relating to all in-house and private patron conservation work.

RETENTION: EVENT (Close of project) + 7 years and destroy confidential

**00111000. LOCAL HISTORICAL SOCIETY FILES** — EVT+10 — SHSW — N

These files document the establishment of local historical societies and their activities and interactions with the State Historical Society of Wisconsin. One function 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. Stat. § 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 (Date of incorporation) + 10 years and transfer to State Historical Society

**00113000. COUNCIL OF LOCAL HISTORY RECORDS** — EVT+10 — SHSW — N

Minutes and agendas of the council and various subcommittees.

RETENTION: EVENT (Date of meeting) + 10 years and transfer to State Historical Society

**00114000. REUBEN GOLD THWAITES AWARD FILES** — EVT+10 — DEST — N

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 (date awarded) + 10 years and destroy

**00121000. CURATOR REFERENCE FILES** — EVT+0/1 — DEST — N

This record series contains research and reference materials relating to the care and management of artifacts. These records are created and maintained to provide quick reference for curatorial staff.

RETENTION: EVENT (Superseded or no longer needed) and destroy

**00124000. ACQUISITION LEAD FILES** — P — PERM — Y

This series contains information about items offered for donation or purchase to the State Historical Society of Wisconsin and/or any historic site. May include photographs of the item, correspondence with the item's owner, and supporting documentation.

Retention justification: The Historical Society acquires items for permanent preservation, so the supporting documentation about these items must be retained permanently.

RETENTION: Permanent

**00127000. NEW PRODUCT FILE** — EVT+5 — SHSW — N

Artwork and designs of merchandise created by Division of Museum and Historic Sites staff or contracted for design by DMHS staff. Includes records related to product development including correspondence with vendors, designers, and manufacturers.

RETENTION: EVENT (Item no longer carried in store) + 5 years and transfer to State Historical Society

| RDA # | RDA Title | Retention | Disposition | PII |
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| 00128A00. | PRODUCT INVENTORIES | CR+3 | DEST | N |

Store and food service monthly and yearly product inventories used to track past sales and trends.

RETENTION: EVENT (Creation) + 3 years and destroy

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| 00129000. | LICENSE AGREEMENTS | EVT+10 | DEST | Y |

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 and destroy confidential

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| 00133000. | LEASE AND MANAGEMENT AGREEMENTS | P | PERM | N |

The lease and management agreement between Circus World Museum and the State Historical Society of Wisconsin.

Retention justification: Permanent retention is necessary because the State Historical Society of Wisconsin and Circus World Museum have an ongoing relationship and the background documentation to this relationship must be maintained.

RETENTION: Permanent

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| 00136000. | CIRCUS PARADE FILES | EVT+3 | SHSW | N |

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 Great Circus Parade held in Milwaukee, Wisconsin, including correspondence with both internal and external parties, negotiations with the City of Milwaukee, and interactions with Great Circus Parade Inc.

RETENTION: EVENT (Date of parade) + 3 years and transfer to State Historical Society

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| 00140000. | ARTWORK AND ILLUSTRATIONS | EVT+10 | DEST | N |

Original artwork and illustrations used for any purpose in various Office of School Services products.

RETENTION: EVENT (Date approved for use) + 10 years and destroy

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| 00157000. | HISTORIC BUILDING SITES FILES | P | PERM | N |

Files created and maintained for a historic building for which there is more documentation than an inventory card. The file may include correspondence, legal documents, newspaper clippings, National Register questionnaires, maps, drawings and photographs. These documents are used to create/update records in the Architectural and History Inventory (AHI) database, part of the Wisconsin Historic Property Database system. AHI serves as an index to these files.

Note: Selected files may have confidential status as outlined by Section 304 of the National Historic Preservation Act.

Permanent retention is necessary because to track the care and conditions of historically important buildings.

RETENTION: Permanent

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| 00158000. | HISTORIC BUILDING COVENANTS | P | PERM | N |

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 retention is necessary because covenants are in effect for perpetuity.

RETENTION: Permanent

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| 00159000. | HOMEOWNERS TAX CREDIT APPLICATION FILES | EVT+5 | DEST | Y |

Files include all documents relating to building rehabilitation projects in which they owner has applied to receive Homeowners Tax Credits. These tax incentives are available pursuant to the Wisconsin Department of Revenue rules. A supplemental state Homeowners Tax Credit is available in Chapter HS 3. These projects involve buildings that are on or eligible for the State Register of Historic Places. The files may include correspondence between owner and State Historic Preservation Office (SHPO); completed

applications; photographs of the building before and after completion of project; construction drawings; work and material specifications; and the program's review of the applications.

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: EVENT (End of project) + 5 years and destroy confidential

**00161000. GENEALOGY CLASS REGISTRATION FORMS** EVT+1 DEST Y

Forms completed by individuals for the purpose of registering for library / archives genealogy classes. Includes personal and contact information and credit card numbers. Secondary use is to create mailing list for notifying registrants about upcoming classes.

This series contains credit card information which is confidential per Wis. Stat. § 19.36 (13).

RETENTION: EVENT(Date form completed) + 1 year and destroy confidential

**00163000. ARTIFACT CASE FILES** P PERM Y

Artifact files detail the history of museum collections including catalog forms, physical descriptions, location, photographs, condition reports, and restoration and conservation reports. These records are retained permanently to ensure that Museum has a complete history of the care each item in the collection has received. The files also contain correspondence with donors or artifact source and needs of gift.

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

Retention justification: These records provide legal proof of collection ownership therefore must be retained permanently.

RETENTION: Permanent

**00165000. SITE DIRECTOR'S CORRESPONDENCE AND MEMOS** CR+5 SHSW Y

Business-related correspondence and memos of the site director related to management of the historic site.

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

**00166000. DIVISION MEETINGS** EVT+10 DEST N

Meeting files for the divisional meetings, including, but not limited to, division management team meetings and divisional meetings including all division staff, and meetings of staff at sites/museums. Meeting files include the agenda and any attached/related material included for discussion and meeting minutes.

RETENTION: EVENT (Date of meeting) + 10 years and destroy

**00167000. LIVING HISTORY RECORDS** EVT+0/1 SHSW Y

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 historical time period in question.

RETENTION: EVENT (Individual no longer portrayed) + 5 years and transfer to State Historical Society

**00168000. ATTENDANCE REPORTS** CR+5 DEST N

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 destroy

**00168A00. ONGOING ATTENDANCE TALLY** P PERM N

An ongoing tally of sites and museum attendance updated continually, used to show long term trends in attendance.

Retention justification: Permanent retention is necessary to illustrate and track site attendance over time. Information is used for long term planning.

RETENTION: Permanent

**00169000. MARKETING CORRESPONDENCE** CR+5 DEST Y

| RDA # | RDA Title | Retention | Disposition | PII |
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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 destroy confidential

**00174000.** **TREATMENT RECORDS** **P** **PERM** **N**

Treatment records document the condition of an item when it arrives at the conservation lab for treatment through photographs and a condition report.

Retention justification: 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

**00176000.** **HISTORICAL MARKERS - APPROVED** **EVT+5** **SHSW** **N**

Includes marker application, research material, photographs, and correspondence with applicants concerning the proposal, approval, and preparation of historical markers.

RETENTION: EVENT (Date of approval) + 5 years and transfer to State Historical Society

**00176A00.** **HISTORICAL MARKERS - NOT APPROVED** **EVT+5** **DEST** **N**

Includes marker application, research material, photographs, and correspondence with applicants concerning the proposal of historical markers.

RETENTION: EVENT (Date of denial) + 5 years and destroy

**00177000.** **COLLECTIONS COMMITTEE RECORDS** **P** **PERM** **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.

Retention justification: Permanent retention is necessary because this series documents decisions about collections the State Historical Society of Wisconsin retains permanently.

RETENTION: Permanent

**00178000.** **CERTIFIED LOCAL GOVERNMENT PROGRAM** **EVT+5** **DEST** **N**

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 CLGs; meeting agendas and minutes submitted to the SHPO for reference purposes; and grant records including applications and notice of awards. Commissions typically meet on a monthly basis and may become active or inactive at any time. 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 (Date of meeting) + 5 years and destroy confidential

**00185000.** **CERTIFIED ARCHEOLOGIST LIST AND CURRICULUMS** **CR+1** **DEST** **Y**

As required by Wis. Stats. § 157.70(1)(i) and Wis. Admin. Code ch. HS 2, 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. This series also consists of curriculum vitaes for certified archaeologists.

RETENTION: EVENT (Creation) +1 year and destroy confidential

**00186000.** **BURIAL OFFICE RECORDS** **P** **PERM** **N**

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.

RETENTION: Permanent

| RDA # | RDA Title | Retention | Disposition | PII |
|---|---|---|---|---|
| 00187000. | PRESS AND PUBLICITY FILES | CR+5 | SHSW | N |

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

| RDA # | RDA Title | Retention | Disposition | PII |
|---|---|---|---|---|
| 00189000. | BOARD OF CURATOR AWARDS | EVT+7 | DEST | Y |

Files relating to the Board of Curators Awards including, but not limited to, those listed below:
- Book of Merit Award
- Genealogy Book Award
- Governor's Archives Awards : Archival Achievement , Archival Advocacy, and Archival Innovation
- Museum Exhibit Award: Exhibit Budget Greater Than $5,000 and Exhibit Budget Less Than $5,000
- Genealogy Book Award
- Historic Preservation Award
- Historic Restoration Award
- Public Program Award
- Reuben Gold Thwaites Trophy for Excellence in Local History

Files include nomination/application forms and narratives, correspondence and press releases. Reason for creation: No existing RDA to cover all awards from the Board of Curators.

| RDA # | RDA Title | Retention | Disposition | PII |
|---|---|---|---|---|
| 00190000. | BOARD OF CURATOR AWARDS LISTS | P | PERM | Y |

Files relating to the Board of Curators Awards including, but not limited to, those listed below:
- Book of Merit Award
- Genealogy Book Award
- Governor's Archives Awards : Archival Achievement , Archival Advocacy, and Archival Innovation
- Museum Exhibit Award: Exhibit Budget Greater Than $5,000 and Exhibit Budget Less Than $5,000
- Genealogy Book Award
- Historic Preservation Award
- Historic Restoration Award
- Public Program Award
- Reuben Gold Thwaites Trophy for Excellence in Local History

Files include nomination/application forms and narratives, correspondence and press releases. Reason for creation: No existing RDA to cover all awards from the Board of Curators.