

Appendix I. Brooklyn Academy of Music Records Retention Schedule: Email Retention Notes

Collecting Email

BAM Hamm Archives actively collects email records as a source of significant information illustrating the history of the Institution. These exchanges provide invaluable insight into experiences and actions influencing the evolution of programming at BAM as well as shifts within the surrounding community.

Very few staff accounts are transferred to the Archives, those that will be have been identified on the Records Retention Schedule. Other types of mail that will be collected come in the form of institution wide communication, such as newsletters, invitations, and educational outreach. Departments are also asked to export important conversation threads that may provide historical context or knowledge of a production. After creating PDF files of these messages, they may be saved to a related project folder.

If you need assistance with the Retention Schedule, or any aspect of email management outlined below, please contact the Archives department.

Department List

Artist Services		
Send to the Archives		
Correspondence	Interesting correspondence with artists, in email or paper form.	Forward emails or letters to archivalemail@bam.org as they occur, or annually on Record Clean-Up Day.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Audience Development and Strategic Planning		
Send to the Archives		
Significant Content	Files about important persons, organizations, events, activities. This includes correspondence	Forward to Archives as it occurs or annually on Records Clean Up Day.

	through email.	
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Box Office		
Send to the Archives		
Records in this department do not need to be sent to the Archives at this time.		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Building Operations		
Send to the Archives		
Operations Newsletters, sent via email	Staff wide updates about current building operations activity and decisions.	Include archives email on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Capital Projects		
Send to the Archives		
Operations Newsletters, sent via email	Staff wide updates about current building operations activity and decisions.	Include archives email on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.

Cinema		
Send to the Archives		
Records in this department do not need to be sent to the Archives at this time.		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Cinematek		
Send to the Archives		
Marketing/Informational materials	<i>*See routine mailings for details.</i>	Include archives email on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Communication/Press		
Send to the Archives		
Newsletters, sent via email	Internal organization communications such as "BAM in the News" and "BAM on #SocialMedia."	Include archivemail@bam.org email address on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Corporate Relations		
Send to the Archives		
Records in this department do not need to be sent to the Archives at this time.		

Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Creative Services [Records Coordinator:		
Send to the Archives		
Records in this department do not need to be sent to the Archives at this time.		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Dance Motion		
Send to the Archives		
Weekly Newsletters	Weekly updates sent internally via email.	Include archivalemail@bam.org email address on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Development, Leadership, Major Gifts, Patron Programming		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Education		

Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Endowment and Board		
Send to the Archives		
Newsletters	Weekly updates sent internally via email: "BAM News This Week" emails.	Include archivalemail@bam.org email address on mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Executive Officers		
Send to the Archives		
Email Correspondence, Significant	Accounts for the following positions will be transferred to the Archives: President Executive Producer Executive Vice President CFO and Vice President of Finance and Administration.	Messages will be exported by I.T. and Archives on an annual basis. There will not be an automated disposition date set for these email accounts.
Maintain within Department		
No records currently in this category.		
Finance		
Send to the Archives		
Email does not currently need to be collected by Archives		

Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Fiscal		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
General Manager		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Government and Community Affairs		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Grants		
Send to the Archives		
Email does not currently need to be collected by Archives		

Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Human Resources		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Humanities		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Information Technology		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Marketing		
Send to the Archives		
Marketing email campaigns	Marketing materials sent to	Include archivalemail@bam.org

	various recipient groups to promote events at BAM.	on all mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Membership		
Send to the Archives		
Targeted Membership Email Outreach	Communication with members about various events and BAM activity.	Include archivalemail@bam.org on all mailing lists.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Patron Services		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Planned Giving		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.

Production		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Programming		
Send to the Archives		
Programming Binders	Research for all performances at BAM, including copies of BAM playbills. Research for all performances at BAM including contracts, detailed show descriptions, selected press, correspondence/email, etc.	Emails may be printed to be included in the binder until further notice.
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Project Management and Strategic Planning		
Send to the Archives		
Significant Project Files	Records of projects of major importance to the institution coordinated or evaluated by PM and SP that will not likely be kept by individual departments, including correspondence/email.	Transfer on Records Cleanup Day
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.

Special Events		
Send to the Archives		
Event Files	Correspondence/email, printed materials, timelines, selected photos, contracts, other documents.	Transfer on Records Cleanup Day
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Theater Management		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Ticket Services		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Video		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		

Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.
Visual Arts		
Send to the Archives		
Email does not currently need to be collected by Archives		
Maintain within Department		
Email Correspondence (General)	Everyday exchanges occurring within email or via paper correspondence.	Automated disposition set for 7 years after creation.

Routine mailings as of June 2017

BAM
 BAM Artist Circle
 BAM Cinematek
 BAM Education
 BAM Kids
 BAM Membership
 BAM Patrons
 BAM Thanks for Coming
 BAM This Week
 BAM Your Visit
 BAM Board News
 BAM in Social Media
 BAM in the News
 BAM Membership Department
 BAM... and then you read this
 Building Operations Newsletter
 Dance Motion USA Newsletter
 Yammer Updates

Access:

Email collected by the Archives is not currently available for research due to legal, financial, and technical limitations. Staff requiring access to information contained in email previously transferred to the Archives may submit a request. A copy will be obtained pending access restrictions outlined below.

Level I

After material has been delivered to the Archives, records that were not originally made public are restricted for a period of 10 years to ensure the privacy of individuals and to protect the organization’s ability to conduct business. Once this period has passed, the Director of the Archives may with the approval of related authorities authorize internal access, or in response to an external request, provide a means of viewing records on-site. Public access will only be granted after approval and review.

Level II

Records originally made public may be freely accessed after delivery to the Archives at the discretion of the Institution.

Disposition

In the context of email, this refers to the intentional destruction of messages based on the Records Retention Schedule, or otherwise, the manual extraction of specific records to move them into the custody of the Archives or a shared server space within the department.

Office 365 allows for automated destruction of mail after assigned periods of time. For information concerning the disposition timelines set for your department, please refer to the Records Retention Schedule.

Individuals to be exported annually:

ROLE	NAME	MIGRATION STATUS	EXPORT STATUS
President	Katy Clark	Account opened in Office 365.	Pending export
Executive Producer	Joseph V. Melillo	Account pending migration.	Pending export
Executive Vice President	Alice Bernstein	Account pending migration.	Pending export
CFO and Vice President of Finance and Administration.	Keith Stubblefield	Migrated to Dell EMS.	Exported 24GB

EMAIL ARCHIVING AT AN ART MUSEUM AND PERFORMING ARTS THEATER

Past collections:

ROLE	NAME	MIGRATION STATUS	EXPORT STATUS
President Emerita	Karen Brooks Hopkins	Removed from Dell EMS server prior to Office 365 migration.	Exported 13.5GB