**Tool #1: Record Organization Chart**

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| **Category** | **Option 1** | **Option 2** |
| **Creative materials** |  |  |
| Choreographic Notes | Work→Date |  |
| Choreographic Notes | Work→Date |  |
| Costumes | Work |  |
| Musical scores and CDs | Work→Composer |  |
| Performance Videos | Work→Date |  Date→Venue |
| Photographs | Work→Date |  Photographer |
| Rehearsal binders | Work→Date |  Date→Work |
| Rehearsal Videos | Work→Date |  |
| Set pieces | Work |  |
| **Production materials** |  |  |
| Administrative/travel details for engagements | Presenter→Tour Date |  Date→Venue |
| Auditions | Work→ Last Name, First Name |  Date→Last Name, First Name |
| Correspondence | Correspondent’s Last Name, First Name→Date |  |
| Engagement contracts and technical riders | Presenter→Tour Date |  |
| Production binders | Work |  |
| Production details for each tour/venue | Presenter→Tour Date |  |
| **Promotional materials** |  |  |
| Posters | Date | Work→Date |
| Programs | Date | Work→Date |
| Press Clippings: articles, profiles, announcements, etc. | Date |  |
| Press Clippings: reviews | Work→Date |  Date→Work |
| Newsletters | Date |  |
| **Organizational Materials:** |  |  |
| Board minutes and correspondence | Date |  |
| Contracts with photographers/videographers/other collaborators | Last Name, First Name/Company Name |  |
| Insurance | Company Name |  |
| Leases | Company Name |  |
| Personnel files, including contracts | Last Name, First Name |  |
| Tax and financial, including audits | Date |  |
| **Education Materials:** |  |  |
| Curricula/teaching materials | Date |  |
| Educational Marketing Kits | Date |  |
| **Development Materials:** |  |  |
| Correspondence | Donor/Funder’s Last Name, First Name→Date |  |
| Donor records | Donor’s Last Name, First Name→Date |  |
| Grant applications | Funder→Date | Date→Funder |
| Grant follow-ups | Funder→Date |  |