**Tool #1: Record Identification Chart**

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of Record** | **What is it used for?** | **Who uses it?** | **Where is it?** |
| *Example: Performance photographs* | *Promotional materials; historical and research use* | *Marketing department; researchers* | *Saved on office computer and back-up hard drive, arranged by work* |
| *Example: Performance videos* | *Promotional materials; restaging work* | *Marketing department; Artistic director* | *On shelf in office, arranged by work* |
| *Example: Contracts with dancers* | *Reference for future contracts* | *Production manager* | *In top drawer of filing cabinet in office, arranged by work and dancers’ last name* |
| **Creative materials** |  |  |  |
| Choreographic Notes |  |  |  |
| Costumes |  |  |  |
| Designs |  |  |  |
| Musical scores and CDs |  |  |  |
| Performance Videos |  |  |  |
| Photographs |  |  |  |
| Rehearsal binders |  |  |  |
| Rehearsal Videos |  |  |  |
| Set pieces, props |  |  |  |
| **Production materials** |  |  |  |
| Administrative/travel details for engagements |  |  |  |
| Auditions |  |  |  |
| Correspondence |  |  |  |
| Engagement contracts and technical riders |  |  |  |
| Production binders |  |  |  |
| Production details for each tour/venue |  |  |  |
| **Promotional materials** |  |  |  |
| Posters |  |  |  |
| Programs |  |  |  |
| Press Clippings: articles, profiles, announcements |  |  |  |
| Press Clippings: reviews |  |  |  |
| Newsletters |  |  |  |
| **Organizational materials** |  |  |  |
| Board minutes and correspondence |  |  |  |
| Contracts with photographers/videographers/other collaborators |  |  |  |
| Insurance |  |  |  |
| Leases |  |  |  |
| Personnel files, including contracts |  |  |  |
| Tax and financial, including audits |  |  |  |
| **Education materials** |  |  |  |
| Curricula/teaching materials |  |  |  |
| Educational Marketing Kits |  |  |  |
| **Development materials** |  |  |  |
| Correspondence |  |  |  |
| Donor records |  |  |  |
| Grant applications |  |  |  |
| Grant follow-ups |  |  |  |
| **Other** |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |