

## Records Timeline for Chapters

### President

<b>Annual Reports</b>	Transfer full record copy to Archives. Retain previous year's report for reference.
<b>Contracts &amp; Leases</b>	Retain with President while current; then transfer to Archives and retain for at least 7 years.
<b>Legal Agreements</b>	Retain with President while current; transfer to Archives afterwards.
<b>Manuals</b>	Retain most current version; discard old manuals.
<b>Special Projects</b>	Transfer all records to Archives upon completion of project.

### Treasurer

<b>IRS Employee Identification Number Form</b>	Send all official copies to Archives; retain reference copy with Treasurer.
<b>Reports (to Board and Membership)</b>	Transfer copy to Archives, if a written report.
<b>Financial Reports (quarterly)</b>	Retain for 7 years, then discard.
<b>Financial Reports (Annual)</b>	Send official copies to Archives; retain reference copy of last 7 years of budgets with Treasurer.
<b>Budgets</b>	Send official copies to Archives; retain reference copy of last 7 years of budgets with Treasurer.
<b>Ledger Cash Journal</b>	Retain last 7 years with Treasurer; transfer older ledger sheets to Archives.
<b>Checkbook</b>	Retain last 7 years with Treasurer; then discard.
<b>Paid Bills &amp; Invoices</b>	Retain last 7 years with Treasurer, then discard. <b>EXCEPTION:</b> Bills and cancelled checks for important payments should <i>not</i> be discarded, for example, conference registrations; transfer to Archives after 7 years.
<b>Reimbursement Forms</b>	Retain last 7 years with Treasurer, then discard.
<b>Cancelled Checks</b>	Retain last 7 years with Treasurer, then discard. See <b>EXCEPTION</b> above.

<b>Bank Statements</b>	Retain last 7 years with Treasurer, then discard.
<b>Bank Reconciliation Forms</b>	Retain last 7 years with Treasurer, then discard.
<b>List of Contributors</b>	Retain last 7 years with Treasurer, then transfer to Archives.
<b>List of Scholarship/Honoraria/Grant Recipients</b>	Retain 7 years with Treasurer, then transfer to Archives.
<b>Assets Files</b>	Retain with Treasurer while active, then transfer to Archives.

#### **Secretary (For Board)**

<b>Chapter Goals &amp; Objectives</b>	Send official copies to Archives; retain reference copy with Secretary.
<b>Meeting Agendas &amp; Minutes</b>	Send official copies to Archives; retain reference copy with Secretary.
<b>Strategic Plan</b>	Send official copy to Archives; retain reference copy with Secretary. Transfer process/planning files to Archives.

#### **Secretary**

<b>Correspondence</b>	Retain current and previous year with Secretary; transfer older files to Archives.
<b>Chapter Records</b>	Retain reference copy of Chapter Charter, Standing Rules, and logos with Secretary. All official matrix records should be in the Archives.
<b>Chapter Procedures</b>	Retain current version with Secretary; send current and previous versions to Archives.
<b>Board Roster</b>	Send official copy to Archives; retain current and previous year with Secretary (for reference).
<b>Membership Roster</b>	Send official copy to Archives; retain current and previous year with Secretary (for reference).
<b>Forms</b>	Retain current versions with Secretary; discard old versions.
<b>Letterhead</b>	Retain current version with Secretary; discard old version.

#### **Membership Committee Chair**

<b>Meeting Agendas &amp; Minutes</b>	Send official copies to Archives; retain current and previous year with Chair.
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<b>Committee Roster</b>	Retain current and previous years with Chair, send official copy of all rosters to Archives.
<b>Committee Process/ Operating Guidelines</b>	Retain current and previous year, send current and previous versions to Archives.
<b>Periodic Reports</b>	Transfer copy to Archives, if written report.
<b>Annual Reports</b>	Send official copies to Archives; retain last 3 years reference copies with Chair.
<b>Membership Maintenance Files</b>	Retain with Chair; Archivist and Chair should review these files for weeding and possible transfer to Archives.
<b>Membership Files</b>	Retain active files with Chair. Consult with Archivist for possibility of transferring inactive files to Archives.
<b>Attendance Records</b>	Send official copies to the Archives; retain current year with Chair.
<b>Projects</b>	Transfer files to Archives upon completion of project.

#### **Nominating Committee Chair**

<b>Meeting Agendas &amp; Minutes</b>	Send official copies to Archives; retain current and previous years with Chair.
<b>Committee Roster</b>	Retain current and previous years with Chair; send official copy of all rosters to Archives.
<b>Committee Process/ Operating Guidelines</b>	Retain current versions with Chair, send current and previous to Archives.
<b>Periodic Reports</b>	Transfer copy to Archives, if written report.
<b>Annual Reports</b>	Send official copies to Archives; retain last 3 years reference copies with Chair.
<b>Board Roster</b>	Retain current and previous years (copies exist with Secretary and Archivist).
<b>Election Files</b>	After the election, transfer to Archives criteria, sample ballot, candidate information, and election results.

#### **Program Committee Chair**

<b>Meeting Agendas &amp; Minutes</b>	Send official copy to Archives; retain current and previous years with Chair.
<b>Committee Roster</b>	Retain current and previous years with Chair, send official copy of all rosters to Archives.

<b>Committee Process/ Operating Guidelines</b>	Retain current version with Chair, send current and previous versions to Archives.
<b>Periodic Reports</b>	Transfer copy to Archives, if written report.
<b>Annual Reports</b>	Send official copy to Archives, retain last 3 years reference copies with Chair.
<b>Program Files</b>	Retain current and previous year with Chair; Archivist and Chair weed files and determine what is transferred to Archives.
<b>Speakers Files</b>	Transfer to Archives after speaking engagement.

### **Research Committee Chair**

<b>Meeting Agendas &amp; Minutes</b>	Send official copy to Archives; retain current and previous years with Chair.
<b>Committee Roster</b>	Retain current and previous years with Chair; send official copy of all rosters to Archives.
<b>Committee Process/ Operating Guidelines</b>	Retain current version with Chair; send current and previous versions to Archives.
<b>Periodic Reports</b>	Transfer copy to Archives, if written report.
<b>Annual Reports</b>	Send official copy to Archives, retain last 3 years reference copies with Chair.
<b>Conferences</b>	Transfer files to Archives after conference has ended.
<b>Journal Clubs</b>	Send copies of reading lists, attendance sheets, etc. to Archives on a regular basis.
<b>Projects</b>	Send files to Archives upon completion of project.
<b>Research Grants</b>	Send files (proposal, grant award, budget, reports, final product) to Archives upon completion of grant.
<b>Research Awards</b>	Send lists of reviewers and applicants, reviews, sample correspondence, evaluations, and final products to Archives annually. Retain successful applicant files; discard unsuccessful applicant files after 2 years.

### **Other Committees/Task Forces**

<b>Meeting Agendas &amp; Minutes</b>	Send official copy to Archives; retain current and previous years with Chair.
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<b>Committee Roster</b>	Retain current and previous years with Chair; send official copy of all rosters to Archives.
<b>Committee Process/ Operating Guidelines</b>	Retain current version with Chair; send current and previous versions to Archives.
<b>Periodic Reports</b>	Transfer copy to Archives, if written report.
<b>Annual Reports</b>	Send official copy to Archives; retain last 3 years reference copies with Chair.
<b>Projects</b>	Send files to Archives upon completion of project.
<b>Journal Editor</b>	
<b>Journal Copies</b>	Send 2 copies to Archives at publication time.
<b>Historian</b>	
<b>Chapter History</b>	Send copy to Archives with each update.
<b>Historian/Members</b>	
<b>Newspaper Clippings/Articles by Members</b>	Photocopy onto acid-free paper and transfer to Archives.
<b>Members</b>	
<b>Photographs</b>	Send in to Archives with completed photograph indexing form.
<b>Artifacts/Realia</b>	Send in to Archives as soon as possible.