

# Archiving Guidelines

## AAUW—Midland Branch

*Adopted March 2019*

Continuity and preservation of Branch history is assured by passing along to your successor records from your service as a Branch officer or committee chair. Some are useful in the short term and others need to be preserved for understanding the history of the Midland Branch.

The guidelines below should help you make decisions about what should be saved during your term and passed on to your successor, what should be discarded at the end of your term, what is useful for your successor and should then be sent to the Branch archives. ***Your efforts will be greatly appreciated.***

The Branch has a designated Branch archivist who will make final decisions about what goes to the archives. The Branch has arranged with the Midland County Historical Society for the long term storage of Branch history.

### Questions to ask ourselves:

- Does the information reflect the activities, purpose, or mission of AAUW—Midland Branch?
- Do we need these materials to prove something did or did not occur?
- Are we required to save these materials for legal, audit, or regulatory purposes?
- Do these materials document activities regarding an important program, issue, or event?
- Do these materials have intrinsic historical value?
- Might these materials have historical value in the future? Do they reflect a program, issue, or event that could become historically significant and that a historian would want to know about in the future?

At the end of each fiscal year (June 30), and before the end of September of the following fiscal year, the outgoing President, Branch Archivist, and one other current or immediate past board member as appointed by the outgoing President will evaluate materials to be sent to the Branch archives.

In the chart below, we will try to distinguish between documents that are to be kept in the files of the office holder, for how long, and what should go on to our archives.

### What to Archive

c=Copy, F=Forever

| Record                              | Office File           | Hold | Archive? |
|-------------------------------------|-----------------------|------|----------|
| <b>Founding Documents</b>           |                       |      |          |
| Articles of Incorporation           | President, c to Treas | F    | Copy     |
| Bylaws (current)                    | President & online    |      |          |
| Bylaws (historic)—keep all versions |                       |      | Yes      |
| Policies & Procedures—current       | President & online    | No   | No       |
| 501(c)(4)—documentation             | President, c to Treas | F    | Copy     |
| Affiliate Agreement                 | President,            | F    | Copy     |

|  |  |                    |                         |
|--|--|--------------------|-------------------------|
| <b>Minutes</b> of any official meeting—Branch including officer/com chr monthly reports, membership, executive committee, task force | Secretary<br>President                     | 4 yrs.<br>2 yrs.   | Yes<br>No               |
| Branch <b>Annual Reports--</b>   | Individual Office/Com Chair<br>Pres Elect  | 3-5 yrs.<br>2 yrs. | Toss<br>Yes             |
| <b>Awards</b> Rec'd. by Branch   | Create a list kept by Sec.                 | F                  | Every 5 yrs.            |
| <b>Grants</b> Received   | Create a list kept by Sec.                 | F                  |                         |
| <b>Correspondence</b> —Routine   | Sec only as long as relevant               |                    | No                      |
| <b>Correspondence</b> —Documenting significant mission efforts, programs, services, projects or events                               | Pres. & Branch Archivist to decide         | F                  | Yes                     |
| <b>Event</b> Records— One page summary created by chair--e.g., WIT Workshop, state mtg.  | President                                  | 5 yrs.             | No                      |
| <b>Press Releases</b>  | Communications Officer & Pertinent Officer | 3-5 yrs.           | No                      |
| <b>Digital Materials</b> —CDs, flash/thumb drives, etc.  | Various                                    |                    | Print relevant          |
| <b>Reports</b> —Project Final  | President                                  | 2 yrs.             | Yes                     |
| <b>Photographs</b> , news clippings  | Various                                    |                    | Determined by Archivist |
| <b>Scholarships Awarded</b>  | List by Sch Chr to Archivist               | F                  | Update Every 5 yr       |
| <b>National Conference for College Women Student Leaders (NCCWCL) Awardees</b>   | List by C/U Liaison to Archivist           | F                  | Update Every 5 yr       |
| <b>Named Gift Honorees</b>   | AAUW Funds Chair                           | F                  | List in Handbook        |
| <b>Publications</b> —State & National TWIG (branch newsletter)   | Office holder keeps 2 yrs.<br>TWIG Editor  | 2 yrs.<br>2 yrs.   | Toss<br>Yes             |
| <b>Past Presidents List</b>  | Secretary & President                      | F                  | List in Handbook        |
| <b>Bank Statements &amp; cancelled checks</b>  | Finance VP                                 | 7 yrs.             | Toss                    |
| <b>Tax returns</b>   | Finance VP                                 | 7 yrs.             | Toss                    |
| <b>Receipts for supplies &amp; services</b>  | Finance VP                                 | 7 yrs.             | Toss                    |
| <b>Financial Review</b> (formerly audit)   | Finance VP & President                     | F                  | Yes                     |
| <b>Year End Financial Report</b>   | Finance VP                                 | F                  | Yes                     |
| <b>Used Book Sale Financial Report</b>   | Used Book Sale Chair                       | F                  | Yes                     |
| <b>Used Book Sale Records</b>  | Used Book Sale Chair                       | F                  | Yes                     |

**During the year-end review by Branch Archivist, President, and additional board member, decisions can be made on whether materials not identified for archiving in the chart above are worthy of archiving after all.**

## Who is Responsible for What?

At a minimum, individual officers/committee chairs should include the items below in their files to pass on to their successors.

Branch Bylaws and Branch Policies & Procedures are posted on the Branch website and available to all members.

Every officer/committee chair is responsible to submit an annual report to the President at the end of the year.

### President

- Articles of Incorporation
- Job Description
- Calendar of Duties and Expectations
- Bylaws—current
- Policies & Procedures—current
- Documentation of 501(c)(4)
- Affiliate Agreement
- Branch Minutes—current 2 yrs.
- Event Records—for 5 years, then discard
- Project Reports—for 2 yrs., then to archives
- Past Presidents List—update yearly
- Copy of Branch Year-end Financial Review
- Branch Annual Reports

### Program Vice President

- Job Description
- Calendar of Duties/Expectations

### Membership Vice President

- Job Description
- Calendar of Duties/Expectations
- Roster of Members by Category

### Finance Vice President

- Job Description
- Calendar of Duties/Expectations
- Branch Bank Statements & Cancelled Checks for 7 years
- Branch Tax Returns for 7 years
- Receipts for Supplies & Services for 7 years
- Yearly Branch Financial Review--then to archives
- Branch Budget

## Secretary

Job Description

Calendar of Duties/Expectations

Minutes of Meetings—Branch including Officer/Com Chr. Reports, Membership, Exec Com & Task Force. Hold for 4 years, then to Archives

Notebook of Motions from all official meetings of the Branch

List of Awards received by Branch

List of Grants received by Branch

Routine Correspondence as long as it is relevant

Correspondence of a significant nature

## Communications Officer

Job Description

Calendar of Duties/Expectations

A notebook of press releases issued by the Branch during the year. Hold for 2 years, then discard.

## Director at Large

Job Description

Calendar of Duties/Expectations

## Nominations Chair

Job Description

Calendar of Duties/Expectations

List of Possible Office Nominees

## AAUW Funds Chair

Job Description

Calendar of Duties/Expectations

List of Named Gift Honorees

## Used Book Sale Chair

Job Description

Calendar of Duties/Expectations

Used Book Sale Financial Reports

Used Book Sale Records

## Public Policy Com. Chair

Job Description

Calendar of Duties/Expectations

Guide the Branch P/P activities based on the State & Association adopted Public Policies

## Bylaws/Parliamentarian

Job Description

Calendar of Duties/Expectations

Update the Branch Bylaws as needed and posting Branch Bylaws to the Branch website

Technology Chair

Job Description

Calendar of Duties/Expectations

TWIG Editor

Job Description

Calendar of Duties/Expectations

Maintain a file of issues of TWIG; then to Archives

College/University Liaison

Job Description

Calendar of Duties/Expectations

Maintain a List of NCCWSL Scholarship Awardees [to go to Branch Archivist every 5 years]

Scholarship Chair

Job Description

Calendar of Duties/Expectations

Maintaining a list of Branch scholarship awardees [to go to Branch Archivist every 5 years]