

Society of Ohio Archivists Records Retention Schedule

This records retention schedule identifies business records of the Society of Ohio Archivists (SOA), their appropriate retention period, and the custodian of the record. The custodian is responsible for retaining the records for the specified amount of time. When the records are no longer of administrative value, the custodian should transfer them to SOA's liaison at the Ohio History Connection (OHC). The liaison will, on an annual basis, transfer materials to the Ohio State University Archives for inclusion in the Society of Ohio Archivist Records.

The records described below may be in either paper or electronic format. If records are made available on the SOA Website, it is the custodian's responsibility for gathering them and converting to PDF format, if necessary, prior to transferring them to the OHC liaison. The liaison will create Bag-It bags to securely transfer electronic materials to Ohio State.

Schedule Number	Record Series and Description	Retention Period	Custodian(s)
<i>Administrative and Legal Records</i>			
SOA-24-01	Constitution and Bylaws	Permanent	<ul style="list-style-type: none"> ● Current copy maintained by the Secretary; ● Keep updated on SOA website; ● Original records maintained in SOA Records.
SOA-24-02	Council and Committee Minutes <i>Includes committee reports.</i>	Permanent	<ul style="list-style-type: none"> ● Maintained by the Secretary and Committee Chairs; ● Official copy maintained in SOA Records.
SOA-24-03	Council Google Group <i>Includes Council correspondence, discussion, and all votes.</i>	Permanent, through Google Groups.	<ul style="list-style-type: none"> ● Members of SOA Council's Google Group.
SOA-24-04	Incorporation Documents (1977)	Permanent	<ul style="list-style-type: none"> ● Maintained in SOA Records.
SOA-24-05	SOA Listserv <i>Includes all correspondence, posts, and notifications sent out over the listserv.</i>	Permanent, through OPLIN.	<ul style="list-style-type: none"> ● Maintained by the Public Information Committee Chair ● OPLIN

SOA-24-06	Council, General Correspondence <i>Includes correspondence of a routine nature, including copies of outgoing correspondence maintained for reference purposes. (If there is a question as to whether or not correspondence is general, the President will make the final determination).</i>	One year	<ul style="list-style-type: none"> ● Maintained by individual Council members.
SOA-24-07	Council, Significant Correspondence <i>Council correspondence dealing with significant aspects of SOA. Correspondence may include information concerning agency policies, procedures, program, fiscal, and matters regarding officers, council members, and committee chairs.</i>	Two years. Appraise for historical value.	<ul style="list-style-type: none"> ● Maintained by Council Officers; ● If deemed historically significant, transfer to SOA Records.
SOA-24-08	Membership Directory <i>A directory of current SOA members.</i>	Maintain until superseded, obsolete, or replaced.	<ul style="list-style-type: none"> ● Maintained by the Membership Committee Chair; ● Public Information Committee Chair will keep updated on the website; ● Superseded copies should be transferred to SOA Records.
SOA-24-09	Membership Registration Forms <i>Forms completed and submitted by members joining or renewing</i>	Two years	<ul style="list-style-type: none"> ● Maintained by Membership Committee
SOA-24-10	Records Retention Schedule <i>Used to identify the retention period for all SOA business records.</i>	Maintain until superseded.	<ul style="list-style-type: none"> ● Official copy maintained by the Secretary; ● Public Information Committee Chair will keep updated on the website; ● Superseded copies should be

			transferred to SOA Records.
SOA-24-11	Records Disposal Forms <i>Forms completed by individuals in possession of SOA records in order to divest themselves of those records, whether to destruction or the permanent SOA Records archive.</i>	Permanent	<ul style="list-style-type: none"> Maintained by the Secretary (as part of the minutes/ attachments)
SOA-24-12	Strategic Planning <i>Long term plan for the organization.</i>	Retain until superseded.	<ul style="list-style-type: none"> Maintained by the Secretary; Public Information Committee Chair will keep updated on the website; Superseded copies transferred to SOA Records.
SOA-24-13	Liability Insurance Declaration Forms	Retain current year plus previous year, unless an open claim requires retention until the claim is resolved.	<ul style="list-style-type: none"> Electronic copies stored on SOA Google Drive account. Physical copies maintained by the OHC representative to SOA.
Educational Programming Records			
SOA-24-14	Correspondence with meeting attendees <i>Includes all correspondence with attendees, including thank you notes.</i>	Two years.	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair.
SOA-24-15	Conference Packets <i>Includes the information that conference attendees receive in meeting packets.</i>	Two years.	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair.
SOA-24-16	Conference Planning Material <i>Information used in the planning of annual meetings, conferences, and workshops. Includes: schedules, local arrangements, and correspondence of the committee.</i>	Two years.	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair.
SOA-24-17	Conference Publicity	Two years.	<ul style="list-style-type: none"> Maintained by the Educational

	<i>Includes flyers, newsletter articles, social media, and other promotional material.</i>		Programming Committee Chair.
SOA-24-18	Contracts <i>Legal agreement, including emendations and addenda, with vendors and speakers.</i>	Eight years.	<ul style="list-style-type: none"> Maintained by the Secretary.
SOA-24-19	Evaluation Forms <i>Completed evaluation forms from meetings, conferences, and/or workshops.</i>	Retain until no longer of administrative value (once final report is submitted to Council).	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair.
SOA-24-20	Financial Records <i>Includes budgets, fundraising correspondence, reports, etc.</i>	Two years.	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair.
SOA-24-21	Presentations <i>Includes presentations voluntarily submitted by conference speakers.</i>	Five years.	<ul style="list-style-type: none"> Maintained by the Educational Programming Committee Chair; Submitted to PIC Chair for inclusion on website. Maintained on website for 5 years.
Treasurer's Records			
SOA-24-22	General Financial Records <i>Includes all records pertaining to financial transactions including amounts received and amounts paid; bank statements and deposit slips; purchasing, requisitions, receipts, invoices/bills, service contracts; cash and account records. Also includes records related to the required annual filing of IRS Form 990</i>	Six years.	<ul style="list-style-type: none"> Maintained by the Treasurer.
SOA-24-23	Treasurer's Reports	Two years.	<ul style="list-style-type: none"> Maintained by the Treasurer.

Program and Public Outreach Records			
SOA-24-24	Audiovisual Material <i>Includes audio, visual, and photographic material and online exhibits.</i>	Permanent	<ul style="list-style-type: none"> • Maintained by the Public Information Committee Chair; • When no longer of administrative value, transfer to SOA Records.
SOA-24-25	Award Recipients <i>Includes Merit, Scholarship, and History Day awards.</i>	One year.	<ul style="list-style-type: none"> • Maintained by the Awards Committee Chair.
SOA-24-26	Newsletter- <i>Ohio Archivist</i> Includes the newsletter, general correspondence, drafts, and author agreements.	Permanent	<ul style="list-style-type: none"> • Maintained by the Newsletter Editor; • Online newsletter maintained by the Public Information Committee Chair.
SOA-24-27	Press Releases	Permanent	<ul style="list-style-type: none"> • Public Information Committee Chair will maintain on the website for three years; • Original press release will be maintained permanently in SOA Records.
SOA-24-28	Publications <i>Includes brochures, posters, workshop material, or other SOA publications.</i>	Permanent	<ul style="list-style-type: none"> • Maintained by the appropriate committee chair; • A copy of additional SOA publications should be maintained by the Public Information Committee Chair; • At least three copies of each publication should be sent to SOA Records for

			permanent retention.
SOA-24-29	Social Media <i>Includes all posts published on SOA social media platforms.</i>	Retain for the appropriate retention period of the appropriate record series.	<ul style="list-style-type: none"> • Maintained by the Public Information Committee Chair.
SOA-24-30	Website <i>SOA website/WordPress blog</i>	Being captured every 30 days.	<ul style="list-style-type: none"> • Maintained by the Public Information Committee Chair.

Approved by SOA Council, December 9, 2024.