

SOCIETY OF OHIO ARCHIVISTS RECORDS RETENTION SCHEDULE

¹**Medium code:** P=Paper, M=Microfilm/Fiche, E=Machine Readable

²**Value code:** C=Confidential, H- Historical, V=Vital

³**Description:** A separate retention period is required for each medium in the same records series.

Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ³	Retention Period
Administrative and Legal Records				
SOA-04-01	P	H	Constitution and By-Laws	Officers retain until superseded. One copy of each version to be transferred to the SOA Archives at OSU for permanent retention.
SOA-04-02	P	H	Incorporation (1977)	Retain permanently in the SOA Archives at OSU.
SOA-04-03	P	H	Minutes Council and Committee meetings	Retain permanently. Officers and committee chairs retain for current plus one year, then transfer to the SOA Archives at OSU.
SOA-04-04	E		Minutes Posted on SOA web site	Retain online permanently.
SOA-04-05	P		Correspondence	Retain routine correspondence for the current year, plus one.
SOA-04-06	P	H	Membership Directory (printed version obsolete)	One copy of each directory to be transferred to the SOA Archives at OSU for permanent retention.
SOA-04-07	E	H	Membership Directory Posted on SOA web site	Retain until superseded. Print out and transfer one copy of each version to the SOA Archives at OSU.
SOA-04-08	P	H	Records Retention Schedule	Retain until superseded. One copy of each version to be transferred to the SOA Archives at OSU for permanent retention.
Financial Records				
SOA-04-10	P		Bank Statements	Treasurer retains current year plus six years.
SOA-04-11	P		Treasurer's Reports	Treasurer retains current year plus one. The annual summary should be transferred to the SOA Archives at OSU for permanent retention.

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Program and Public Outreach Records				
SOA-04-12	P	H	Audiovisual material Includes photographs	Retain permanently in the SOA Archives at OSU.
SOA-04-13	P	H	Awards Includes Merit and History Day awards recipients	Retain permanently. President retains current year plus one, then transfers to the SOA Archives at OSU.
SOA-04-14	P	H	Brochures and Posters Includes Membership, Program, Conferences, Archives Week, and Education Committee workshops, etc.	Retain permanently in the SOA Archives at OSU.
SOA-04-15	P	H	Newsletter-Ohio Archivist (printed version obsolete)	Retain permanently in the SOA Archives at OSU.
SOA-04-16	E	H	Newsletter-Ohio Archivist Posted on SOA web site	Retain online permanently. Print out and transfer one hard copy of each edition to the SOA Archives at OSU.
SOA-04-17	E	H	Online Exhibits Posted to the SOA web site	Retain permanently. Print out and transfer to the SOA Archives at OSU.
SOA-04-18	P	H	Press Releases	Retain permanently in the SOA Archives at OSU.
SOA-04-19	P	H	Publications Includes any publications not otherwise specified, such as SOA Histories, etc.	Retain three copies of each permanently in the SOA Archives at OSU. Discard duplicates when obsolete.
SOA-04-20	P		Reference Material	Retain until the information is superseded.