

ARCHIVAL MATERIAL

The following records are normally of value to the organization, historian and researcher:

ADMINISTRATIVE RECORDS

- Bylaws – one copy of the original and each revision of the league itself.
- A list of the charter members, if available.
- Policy statements – directives and regulations issued by or to executives and other personnel.
- Financial Records – basic financial reports should be retained. Annual reports, general ledgers, the non-current treasurers' records, including monthly reports. Statistical and comparative summaries and surveys may also be of value.
- Minutes – of all meetings, plus minutes of all committees as they are the operating documents for decision and policy information for the league.
- Reports – any report issued by executives, boards, committees of the league relating to activities, plans, projections and annual reports should be retained.
- Correspondence – all official correspondence dealing with policies, function, personnel, plans and programs of the league should be included.

RETENTION SCHEDULE

It is a good idea to have a process in place in which records due for retention are inventoried and boxed for storage or transfer to the archives. Records due for destruction may be shredded or recycled depending on the nature of the information. Confidential or sensitive material should be shredded. It is helpful to designate a specific time each year to review and prepare the records. This is referred to as a retention schedule and allows for consistency and ease of retrieving information.

TEMPORARY RECORDS DESTRUCTION LIST

Some records created in the course of activities have limited value. Below is a list of some items that may be destroyed and a suggested time frame for such destruction.

- Contracts that have not been accepted. These may be kept for reference information purposed only, but they have no historical value. If it is decided that they are not required any longer, a time frame of two years is generally all that is necessary.
- Communications with members, such as thank you letters, congratulatory notes, etc. have a limited amount of information and may be destroyed after two years.
- Photocopied form letters and any other materials that have been mass distributed should be destroyed each year. One copy of the original should be kept in a permanent file to be retained in the archival records.
- Program materials – again only one copy should be saved and all other copies should be destroyed on completion of the programs. Two years would be the limit of retention of this type of information.
- Parts of the financial records that may be destroyed after the taxation year plus six years are: remittance envelopes, deposit slips, cancelled cheques. Make sure you retain financial statements.
- Miscellaneous items that do not fall under either the retention items or the destruction categories above should be retained until further investigation. The rule is: “When in doubt, retain.” Check the LWML–Canada Archivist.