

**Twin Cities Chapter of ARMA  
Guidelines for Records Retention  
Revision 3 – November 21, 2005**

1. Each outgoing Board member is responsible for cleaning up their operations manual before passing it onto the incoming Board member or having it archived.
2. Only those documents related directly to the position are to be maintained in the operations manual – i.e. The secretary is the only person who needs to maintain a copy of the minutes, the Vice President is the only one who needs to maintain a copy of the Program Brochure, etc.
3. When indexing records for storage, the appropriate retention code must be used (refer to Chapter Retention Schedule) and a consistent manner of indexing should be followed using the Record Series Description and similarly indexed records. Standardized descriptions are highly recommended.
4. Destruction will occur on an annual basis following the June transition meeting. The Chapter President will be responsible for the approval of all Certificates of Destruction.

**ARMA International – Twin Cities Chapter  
Retention and Disposition Schedule**

<u>Record Series</u>	<u>Retention Code</u>	<u>Office of Record</u>	<u>Official Retention</u>	<u>Unofficial Copy</u>
Agenda, Board Meeting	AG01	President	CY + 1	
Archive Index	AR01	Secretary	SU	
Articles of Incorporation	AR02	Secretary	LOC	
Audit Report and Work Papers	AU01	Board Chairperson	CY + 6	Treasurer
<b>Awards</b>				
Member of the Year	AW01	Board Chairperson	LOC	
COTY Submission	AW02	Board Chairperson	LOC	
Chapter Award (Given)	AW03	Board Chairperson	LOC	
Chapter Award (Received)	AW04	Board Chairperson	LOC	
Bank Statement	BA01	Treasurer	CY + 6	
<b>Brochures (1 copy)</b>				
Membership	BR01	Membership Director	LOC	
Program	BR02	Vice President	LOC	
Seminar/Conference	BR03	President Elect	LOC	
Scholarship	BR04	Education Director	LOC	
Marketing	BR05	Public Relations Director	LOC	
Budget Information	BU01	Budget & Finance Director	CY + 3	Treasurer
Bylaws	BY01	Secretary	LOC	Web Director
Certificate of Records Destruction	CE01	Secretary	CY + 10	
Checks – Cancelled	CH01	Treasurer	CY + 6	
Charter	CH02	Secretary	LOC	
Conference Proceedings	CO01	President Elect	LOC	
Constitution	CO02	Secretary	LOC	
<b>Contracts</b>				
Meeting Locations	CO03	Arrangements Director	ACE + 6	
Spring Conference	CO04	Arrangements Director	ACE + 6	President Elect
Recognition Night	CO05	Arrangements Director	ACE + 6	President
<b>Correspondence</b>				
Association	CO06	President	CY + 3	
Board Members	CO07	Board Member	CY + 3	
Committee	CO08	Committee Chair	CY + 3	
General	CO09	Board Member	CY + 3	
Deposit Slip	DE01	Treasurer	CY + 6	
Directory – Membership	DI01	Membership Director	LOC	
Disbursement Authorizations	DI02	Treasurer	CY + 6	
Education Postings	ED01	Education Director	CY + 1	
General Ledger	GE01	Treasurer	CY + 6	
Insurance Policy	IN01	Treasurer	ACE + 6	
Invoice – Paid	IN02	Treasurer	CY + 6	
Job Postings	JO01	Employment Director	CY + 1	Web Director
Library Holding List	LI01	Education Director	SU	Web Director
<b>Manuals (including meeting minutes)</b>				
Chapter Program/Seminar Planning	MA02	Committee Chair	CY + 3	
Spring Conference Planning	MA03			
Meeting Notice	ME01	Vice President	CY + 1	Web Director
Meeting Attendees – List	ME02	Arrangements Director	CY + 1	
Membership Application (Inquiry)	ME03	Membership Director	CY + 1	
Minutes – Board of Directors	MI01	Secretary	LOC	Web Director
Newsletter	NE01	Publication Director	LOC	Web Director
Newsletter–Vendor Advertising Request	NE02	Publication Director	CY + 6	
Permission to Reprint	PE01	Publication Director	CY + 3	
Procedures	PR01	Board Member	SUP + 10	
<b>Publicity</b>				
Photos (submitted to Newsletter)	PU01	Public Relations Director	LOC	Web Director
Photos (retained on website)	PU02	Web Director	CY + 1	
Press Release	PU03	Public Relations Director	LOC	
Proclamation (signed original)	PU04	Public Relations Director	LOC	
Receipts	RE01	Treasurer	CY + 6	
Records Retention Schedule	RE01	Secretary	SU + 10	
<b>Scholarship</b>				
Application	SC01	Education Director	CY + 1	
Fund Records	SC02	Treasurer	CY + 6	
Treasurer's Report	TR01	Treasurer	CY + 6	Web Director
Website (archived monthly)	WW01	Web Director	CY + 3	

**Key (all numbers represent years)**

ACE = after contract expires

CY = current year

LOC = life of chapter

SU = until superceded