

Records Retention Schedule for the Southeastern Library Association

President

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Contracts & Leases

Retain with President while current; then transfer to Archives and retain for at least 7 years.

Legal Agreements

Retain with President while current; transfer to Archives afterwards.

Manuals

Retain most current version; discard old manuals.

Special Projects

Transfer all records to Archives upon completion of project.

President-Elect

Conference Planning Materials

Retain with President-Elect while current; transfer to Archives afterwards.

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Immediate Past President

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Treasurer

IRS Employer Identification Number Form

Send official copy to Archives; Retain reference copy with Treasurer.

Biennium Report

Send copy to Archives. Retain previous biennium's report for reference.

Financial Reports (Annual)

Send copy to Archives; retain reference copy of last 7 years with Treasurer.

Budgets

Send official copy to Archives at year end; retain reference copy of last 7 years with Treasurer.

General Ledger

Send copy of year-end detail report to Archives; retain reference copy of last 7 years with Treasurer.

Check Stubs

Retain last 5 years with Treasurer.

Paid Bills & Invoices

Retain last 5 years with Treasurer.

Reimbursement Forms

Retain last 5 years with Treasurer.

Bank Statements

Retain hard copy of last 5 years with Treasurer.

Bank Reconciliation Forms

Retain last 5 years with Treasurer.

Secretary (for Board and Executive Committee)**Meeting Agendas & Minutes**

Send official copies to Archives; retain reference copy with Secretary.

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Strategic Plan

Send official copy to Archives; retain reference copy with Secretary; transfer process/planning files to Archives.

Correspondence

Retain current and previous year with Secretary; transfer older files to Archives.

SELA Records

Retain reference copy of SELA Charter, Standing Rules, and logos with Secretary. All official matrix records should be in the Archives.

SELA Procedures

Retain current version with Secretary; send current and previous versions to Archives.

Administrative Services

Board Roster

Send official copy to Archives; retain current and previous year with Administrative Services (for reference).

Membership Roster

Send official copy to Archives; retain current and previous year with Administrative Services (for reference).

Leadership Directory

Send official copy to Archives.

SELA Business Meeting Materials

Send official copy to Archives.

SELA Election Files

Send official copy to Archives.

SELA Summer Conference Materials

Send official copy to Archives.

SELA Conference Programs

Send two copies to Archives.

SELA Conference Artifacts/Realia

Send to Archives.

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

State Representatives

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Section Chairs

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Meeting Agendas & Minutes

Send official copy to Archives; retain current and previous years with Chair.

Committee Roster

Retain current and previous years with Chair; send official copy of all rosters to Archives.

Committee Process/Operating Guidelines

Retain current version with Chair; send current and previous versions to Archives.

Periodic Reports

Transfer copy to Archives, if written report.

Projects

Send files to Archives upon completion of project.

Round Table Chairs**Biennium Report**

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Meeting Agendas & Minutes

Send official copy to Archives; retain current and previous years with Chair.

Committee Roster

Retain current and previous years with Chair; send official copy of all rosters to Archives.

Committee Process/Operating Guidelines

Retain current version with Chair; send current and previous versions to Archives.

Periodic Reports

Transfer copy to Archives, if written report.

Projects

Send files to Archives upon completion of project.

Committee Chairs**Meeting Agendas & Minutes**

Send official copy to Archives; retain current and previous years with Chair.

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Committee Roster

Retain current and previous years with Chair; send official copy of all rosters to Archives.

Committee Process/Operating Guidelines

Retain current version with Chair; send current and previous versions to Archives.

Periodic Reports

Transfer copy to Archives, if written report.

Projects

Send files to Archives upon completion of project.

Journal Editor**Journal Copies**

Send link to Archives at publication time.

Biennium Report

Transfer full record copy to Archives. Retain previous biennium's report for reference.

Archivist**Biennium Report**

Transfer full record copy to Archives. Retain previous biennium's report for reference.

SELA History

Send copy to Archives with each update.

SELA Constitution & Bylaws

Send two copies to Archives with each update.

SELA Handbook

Send two copies to Archives with each update.

SELA Board and Executive Committee Emails and Other Correspondence

Collect emails sent to Board and the Executive Committee. Send a copy of each email to Archives.

SELA Listserv Posts

Collect SELA listserv posts that are not job postings. Send a copy of each listserv post to Archives.

Journal Copies

When an issue of *The Southeastern Librarian* is published, send two copies to Archives.

Members

Photographs

Send in to Archives with completed photograph indexing form.

Artifacts/Realia

Send in to Archives as soon as possible.