

GUIDELINES FOR CHAPTER ARCHIVES

I. Purpose

The mission of chapter archives is to collect, preserve, index, and make available historical records and materials on the development of a Sigma Theta Tau International chapter.

Note: Archives contain paper, primary source material (not copyrighted), pictures, and artifacts. (Museum contains other materials.)

II. Evaluation of Records

A. Duration

Begins with preliminary examination and continues until item is indexed and placed in repository or is rejected

B. Rejection

Materials may be rejected if study shows they do not possess value either as a part of a collection or as an isolated item

1. Records that contain information duplicated in another form, such as carbons of letters, speeches, programs and agenda
2. Subsidiary documents - the essential data from which is included in summary records
3. Housekeeping - records - interoffice memos and other type records that are important in daily operations but do not possess intrinsic value and have little or no importance in historical perspective
4. Fragmentary account books, unsupported by other papers (the repository may have samples of the same type record for the same period)
5. Letters and other materials that are not important because of author, content or relationship with other portions of the collection

C. Appraisal

1. Old records should be judged by different standards than new records
2. Corporate records should be judged in relation to:
 - a. Evidence they contain of the organization and functioning of the body that produced them
 - b. Information they contain on persons, things and phenomena
3. Value analysis
 - a. Evidential values - determined on the basis of an analysis of administrative structure of the body that produced the records and the functions, activities and transactions that resulted in the production of records
 - b. Information values - determined on basis of an analysis of the documentation available in published or in unpublished sources in matters to which records pertain

III. Retention of Records

A. General

1. Preserve records pertaining to the direction of the organization, those pertaining to policy, procedure and the like. For intermediate units, preserve records that pertain to the administration and not those of direction.
 - a. All records which are required to be kept by U.S. or state laws should be preserved
 - b. All records which protect the legal rights of the organization, its employees or members should be preserved

2. Transfer to the archives - The records should stay in the working files of the office, officer or committees as long as the records are active (referred to frequently)

B. Official Records

1. Constitution and bylaws in original and revised forms including preliminary drafts of the original and its revisions and a copy of the charters
2. Minutes of all meetings with complete set of records attached
3. Correspondence, except routine matters which do not give important information
4. Publicity and news releases
5. Oral and written histories

C. Financial Records

1. Ledgers and books of final entry
2. Journals from which ledger entries are made provided they give information readily available in final entry
3. Correspondence which gives information not available in the books of entry
4. Records of bequests, annuities, endowments, etc.
5. Auditors' reports

D. Records of Officers

1. Correspondence, except routine.
2. Papers, reports and records of the chapter officers
3. Any memorabilia which has a historical value

E. Records of Committees

1. Minutes and reports
2. Correspondence, except routine
3. Personnel records from any officer or committee
 - a. May have personal folders under the name of the person

F. Publication - Official publications, photographs, pamphlets, brochures, etc.

IV. Disposal of Materials

A. Discard the following:

1. Routine notices concerning meetings, etc.
2. Routine correspondence (i.e. covering letters, accompanying statements, payments, and receipts)
3. Financial - after 6 years discard the following, providing entries were made and audits were done: (samples may be kept at stated intervals) cancelled checks, check stubs, statements, invoices and receipts