

## Guidelines on the retention of records produced by Soroptimist clubs in the UK and Ireland in the SIGBI Federation

Records	Retention period	Officer responsible
Club Charter	Permanent while club is in existence. If a club closes the original charter <b>must be returned to Federation Office</b>	Secretary
AGM Minutes – signed copies	Permanent	Secretary
Officers' annual reports	Permanent	Secretary
Annual Accounts – signed copy	Permanent	Treasurer
Minutes of Executive meetings - signed copies	Permanent	Secretary
Minutes of Business meetings – signed copies	Permanent	Secretary
Officers' reports (if not included in minutes)	Permanent	Secretary
Club Development Plan – 1 copy of each	Permanent	Development Officer or Secretary
Annual membership list & programme	Permanent	Secretary
Financial records – bank statements	Current year + 6	Treasurer
Financial records – invoices etc.	Retain while required for administrative use then keep a sample related to any special events or 1 year in 10 to record changes in costs etc.	Treasurer
Club newsletters – 1 copy of each	Permanent	Secretary
Annual Charter Dinner programme and invitation list	Permanent	Secretary
Correspondence	Retain while required for administrative use then keep a sample related to any special events or major policy decisions. Files selected for permanent retention should be weeded of duplicates and unnecessary materials e.g. compliments slips etc.	Secretary
Copies of returns to SIGBI or UKPAC re	Permanent	Secretary or appropriate

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Programme Action work and membership		officer
Scrap books, photograph albums	Permanent	President, officers and members

It is generally recommended that records should be retained by the responsible officers and passed on to their successors while the records are required for the smooth running of the organisation, this is usually for at least current year + 5 for administrative records and current year + 6 for financial records. All records and photographs to be retained should be kept in hard-copy not in electronic/digital format and it is advisable that news-cuttings should be photocopied.

*Records not for permanent retention that include any personal information should be shredded not placed in ordinary paper waste for recycling.*

### Storage

Records should be stored in boxes in a cool, stable environment away from the risk of damage from fire, damp and dirt. *It is generally not recommended to keep paper and photographs in attics, basements, cellars, garages and sheds.* (A leaflet with more advice on the storage and preservation of records is available from the Federation Archivist).

***Once no longer of administrative use, records for permanent retention may be best deposited with an appropriate local County Record Office for secure safe keeping and management.***

### What should not be kept for long term preservation?

Once no longer required for administrative purposes copies of reports from SI and SIGBI, Federation and SI newsletters and other region or Federation papers, Annual Federation and International Conference papers need not be permanently retained by clubs in the UK and Ireland and should not be deposited with a local County Record Office, unless they contain material specifically relating to the activities of that club.



The **Federation Honorary Archivist** can be contacted for advice on any issues relating to the preservation of records and for details of local County Record Offices in their area [sigbiarchives@live.co.uk](mailto:sigbiarchives@live.co.uk)