

NEVADA WOMEN'S HISTORY PROJECT - RECORDS RETENTION SCHEDULE (Approved February 2012)

Ret. #	Record Title	Description	Disposition
1	NWHP Policies and Procedures (formerly called BY-LAWS)	Documents which contain the basic rules by which the NWHP conducts its business & prescribes how the NWHP functions as noted in Section II of the Nevada Women's Fund Policies of Programs of the Nevada Women's Fund of March 25, 2000. (Prior to this policy, programs of the Nevada Fund were allowed to have by-laws).	Archive copy is permanent. When revised, one copy of each approved revision will be filed in the NWHP's archives by the committee involved in the revision. One copy of each revision and previous approved by-laws will be filed in the NWHP archives.
2	Current Officers List	Lists of new and returning officers.	Archive copy is permanent. After every election, the election committee will submit a list of the elected and returning officers to the Nevada Women's Fund and a copy to be filed in NWHP Archives. Lists are also published in every newsletter.
3	Chairman's Records	Records compiled by NWHP Chairman during his/her term in office, may include: agendas & minutes of all meetings; treasurer's reports; financial reports; committee reports or information; correspondence; e-mails and NWHP Newsletter.	Permanent. At the end of his/her term of office, the Chairman may transfer the records to the incoming Chairman and any previous Chairman's records to the NWHP archives.
4	Reports	Reports submitted by committee officers and chairs at each meeting.	Permanent. One copy is to be filed in the Chairman's records.
5	Recording Secretary's Records	Records compiled by the Recording Secretary during his/her term in office. Will include approved copy of minutes of all meetings, attendance sheets, motion sheets and correspondence.	Permanent. At the end of his/her term, the Recording Secretary will transfer his/her records to the incoming Recording Secretary and the previous Recording Secretary's records to the NWHP's archives
6	Corresponding Secretary's Records	Letters sent and received. Reported on or read by corresponding secretary at meetings.	Those deemed to be of long term value will be filed in the current Chairman's records. Notices of events and other correspondence without long-term value to be filed by the Corresponding Secretary and at the end of the term of office, may be destroyed.
7	Treasurer's Reports submitted and filed at meetings	Accounting reports of expenditures & receipts compiled by the Treasurer and individual/dedicated project accounting files.	Permanent. At the end of his/her term, the Treasurer will transfer these records to NWHP's archives.
8	Accounts Payable Records	Records used to pay the NWHP's bills and expenses; includes: Request for Payment forms, bills, notes & correspondence regarding payments made by the Treasurer. File by Check Number (See Accounts Payable) records-activity or event, retention #9).	3 years. Treasurers may transfer to NWHP archives at any time, but must transfer them at the end of his/her term of office. Copies of checks received will be stored in <b>locked</b> filing cabinets in the archives and will be shredded or burned after 3 years.
9	Accounts Payable Records – Activity or Event	File separately by activity or event. The records of any activity/event still ongoing at the end of Treasurer's term, will be transferred to the incoming Treasurer. When activity/events is complete, transfer to NWHP archives.	3 years after the activity/event is completed. Copies of checks received will be stored in <b>locked</b> filing cabinets in the archives and will be shredded or burned after 3 years.

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10	Bank Statements and Deposits	Monthly statements received from bank showing amount of money on deposit in the NWHP accounts & monthly transactions; records of deposits with copies of received checks attached.	3 years. Treasurers may transfer to NWHP archives at any time but must transfer them at the end of his/her term of office. Copies of checks received will be stored in <b>locked</b> filing cabinets in the archives and will be shredded or burned after 3 years.
11	Cancelled Checks (or bank copies provided with bank statements)	Checks written on the NWHP's bank account which were returned after payment by the bank. All checks require two signatures.	3 years. Treasurers may transfer these records to the NWHP archives at any time, but must transfer them at the end of his/her term of office.
12	Check Registers	Register of checks written, arranged chronologically, showing to whom they were written, check number, date of check and amount of payment.	3 years. May be kept longer if checkbook is not completely used by that time.
13	Money Market Accounts	Reports of designated accounts placed in the money management fund used by the Nevada Women's Fund.	3 years after account is closed, unless needed for grant reporting.
14	Financial Account Signatories	List of members authorized to handle and write checks on bank accounts or money market accounts.	3 years after superseded. A list of members authorized to sign checks and oversee bank accounts and money market accounts listed by each account will be filed in the office as soon as records are submitted to the bank or institution with any changes and one copy to be placed with the Nevada Women's Fund.
15	Tax Exempt Letter issued to Nevada Women's Fund	Letter to be shown to or submitted to vendors as proof of NWHP's tax exempt status.	One copy to be filed in office. Members may have copies to use when dealing with purchasing anything for NWHP. When superseded, destroy previous letter.
16	Bank Statement of All Accounts – December Only	The last bank statement of the year is needed for the Women's Fund annual audit.	Original, not copies. December bank statements will be loaned to the Nevada Women's Fund when requested to be used in the annual audit. Original will be returned to each Treasurer when audit is completed.
17	Fund Raising Project/Event Records	May include programs, correspondence, financial material dealing with the event/project, mailing information, printing information or other materials generated about the event/project which are deemed helpful to plan other projects/events.	Permanent after placed in the NWHP archives, except that any copies of checks from attendees follow Retention #9.
18	Treasurer's Fund Raising Project/Activity Records	Accounting reports of expenditures and receipts on activities/events. File separately by activity/event.	Permanent after placed in the NWHP archives, except that any copies of checks from attendees follow Retention #5.
19	Awards & Certificates received by the NWHP	Includes plaques, certificates or any other type of recognition received by the NWHP.	Permanent in the archives. May be exhibited at events or in the office or Nevada Women's Fund office.
20	Memorabilia & Photographs	Memorabilia generated by, or received by the NWHP. May include programs of special events, newspaper clippings, guest books, or other items having historic value; selected photographs taken of members or NWHP activities.	Permanent. Photographs may be maintained by NWHP photographer or other member designated or placed in the archives.

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21	NWHP Membership Applications (new or renewal)	Applications of new members or applications or notice of renewal of membership. Copies of member's checks should not be used, but information may be transferred to a membership form before submitted the check to the treasurer if an organization.	One year after the end of the calendar year, then destroy by shredded or burning. May be maintained in a binder by membership committee or chair.
22	Membership Lists or Rosters	Membership list containing members' names, mailing addresses, phone numbers, and e-mail addresses to be maintained.	To be maintained by the membership chair. A copy of the last revised list generated in each membership year will be filed in the NWHP archives in the membership binder.
23	Jean Ford Research Center Sign-in Sheets	Members, guests or researchers must sign time in and out and purpose of visit on the sign-in sheet when using the Jean Ford Research Center.	May be of value when applying for grants. Maintain as long as feasible for ongoing grant, otherwise retain two years in office, then destroy.
24	Jean Ford Research Center Check-out Sheets	Form on which items removed from the Jean Ford Research Center re listed showing the item(s) removed, date removed and by whom, expected return date and date when item is returned.	Maintain in Jean Ford Research Center until all checked out items listed on individual sheet have been returned, then may be destroyed.
25	NWHP Operations Guide	This Guide contains the policies and procedures of NWHP and provides the authority for the activities of NWHP.	One copy permanent because of historic value. When superseded, one copy will be placed in the NWHP's archives. (Includes previous approved and superseded copies of by-laws of NWHP) may be filed in a binder in the archives.
26	NWHP Roll of Honor Binder	Includes submitted and approved nomination forms, handouts, procedures, information on judges, correspondence, copies of list approved by judges and other material pertaining to award presented.	Maintain binder(s) permanently. Retain applications not awarded for 1 year then destroy by shredding or burning.
27	NWHP Newsletter	Newsletter sent to all members quarterly, monthly or bi-monthly.	One copy is permanent. Newsletter editor will transfer 1 copy of each newsletter to the newsletter binder in the archives after mailing