

7. Soroptimist International of Chico Archives Project

The Archives Project was undertaken in 2003 as part of the SI Chico 75th Anniversary celebration in 2005. There were 2 primary objectives: 1. knowing more our history and contributions, and 2. donating the collection to the University Library/Special Collections to provide a history and context for women's contributions to Chico. A project allocation of \$10,000 was established to complete the project.

The SIA records retention guidelines were used to develop local guidelines for record retention (attached). Two librarian members of the Club, Juliann Clarke and Carolyn Dusenbury, were appointed as Archivists to oversee the project and they continue to develop the collection.

The project began by collecting about 70 boxes of records, photographs, press books, president's books, memorabilia and financial information. In addition to the operational records of Club activities, the history of the primary fund raiser, the Home, Garden and Antique Show, were gathered into one place. A Public History graduate student was hired to organize the records from 1930 to 1980 using national recognized archival principles. The first donation to Special Collections was made in 2004. In 2009, the Board authorized the transfer of SI records from 1981 to 2000 to Special Collections.

The collection is housed in 78 archival boxes in Special Collections as Manuscript Collection (MSS) 283. Permanent link to this record:

<http://opac.csuchico.edu/record=b1809318~S5>. The folder list finding aid is available at <http://opac.csuchico.edu/articles/1809318.1656/1.PDF>.

Records Retention Schedule* December 2007

Guidelines for retention are listed by record type and retention period. In general, all financial information is retained for 7 years to comply with tax regulations. The suggestion for other business records is 5 years. Items designated "permanent" are organized and retained by the Club. Records are organized by year in standard categories (see folder lists)

- Permanent records: Tax returns, audits, presidential summaries, etc. are permanently retained by the club.
- The Club retains the records until they are deposited in the California State University, Chico / Meriam Library / Special Collections Department (Manuscript Collection MSS. 283).

Record Type	Retain
Artifacts or memorabilia (retain only if significant to club history)	Permanent
Audited financial reports	Permanent**
Bylaws and Guidelines	Permanent
Cancelled checks and check registers	7 years
Certificates of deposit (after expiration)	7 years
Charter documents	Permanent**
Committee records – Awards and Recognition Comm. – Successful award applications and correspondence. Retain unsuccessful applications and ratings sheets for 1 year. Awards allocations/budget. Service– Major service projects, service allocations. All committees – rosters, significant projects	Permanent
Contracts	7 years after fulfillment
Correspondence – include significant correspondence about programs, policy development, community relationships, major projects; correspondence lists.	Permanent
IRS designations	Permanent
Financial Records – Accounts payable – checks, vouchers, bills, notes and correspondence regarding payments Accounts receivable Treasurer’s reports – Balance sheers, Profit and Loss, General Ledgers, etc.	7 years
Home, Garden and Antique Show – all records; financial records retained for 7 years.	Permanent
Membership lists	Permanent
Minutes – Agendas and minutes of Board and Business meeting minutes	Permanent
Newsletters	Permanent
Photographs – Identify if possible	Permanent
President’s Books / Scrapbooks	Permanent
President’s summaries	Permanent**
Publicity – News releases, newspaper clippings, etc.	Permanent
Tax returns	Permanent**

*Adapted from SIA Suggested Retention Periods (provided by Lisa Mangiafico, SIA Archivist, 12-1-03) and Sierra Nevada Region retention schedule.

** Stay in club possession in “Permanent Records” boxes.

