

Record Retention Policy for the Augusta State University Chapter #166 of the Honor Society of Phi Kappa Phi

The archival records of the Augusta State University Chapter of the Honor Society of Phi Kappa Phi will be kept in the Special Collections Department of ASU's Reese Library. A Deed of Deposit signed by the 2010-11 Executive Committee members is on file in Reese Library. The contents of the PKP archives remain the property of the Chapter.

Financial Records:

The following items are to be scanned and kept in the library as chapter archival records:

1. Minutes of meetings of the membership
2. Minutes of meetings of the executive committee
3. Annual financial reports to PKP national
4. Annual financial reports presented to the membership or executive committee
5. Audit or compilation reports received
6. Tax returns and receipts for filing (first required in 2007)

The following items are to be kept by the treasurer and destroyed in the eighth calendar year following the end of each fiscal year:

1. Financial reports, except for the report for each fiscal year end, presented to the membership or executive committee
2. Bank statements and checks
3. Invoices
4. All other records maintained by the treasurer

For example, for fiscal years ended June 30, 2003 and prior, all information that is not on the permanent records list items 1 through 6 above should be destroyed after January 1, 2011. Each January certain information should be destroyed for the fiscal year ended 7 ½ years previously.

Other Administrative and Historical Records:

Records other than Financial Records for PKP that should also be retained include:

- Administrative files and correspondence
- Other meeting minutes such as those of committees and ad hoc working groups
- Chapter history
- Miscellaneous materials related to the chapter's history
- Annual A-Day Symposium and Arsenal Lecture Series materials
- Initiation programs
- Lecture programs
- Membership rosters
- Posters from programs and lectures

Special policies:

- For original individual membership records retained, access will be limited to the Executive Board or anyone the Board as a body approves.
- In every case, Social Security Numbers and similar identifying information will be removed.

Approved by the ASU Chapter of the Honor Society of Phi Kappa Phi on March 15, 2011