



Society of  
Women Engineers

How to Keep **SWE**  
**RECORDS**

*A Guide for Section & Region Officers*

## **Table of Contents**

Introduction .....	3
Records Management .....	4
Records .....	5
Securing Records .....	6
Filing Records .....	7
Saving and Disposing Records .....	11
Preserving Records for Posterity .....	12
Electronic Records Management.....	14
Appendix 1A: Example of a Records Inventory .....	15
Appendix 1B: Example of a Box Inventory .....	16
Appendix 1C: Suggested Retention & Disposal Schedule .....	17
Appendix 2: Quick Reference: Dos and Don'ts .....	21
Appendix 3: Directory of Libraries & Archives with Science, Engineering, and/or Women's History Collections.....	23
Glossary .....	23

Acknowledgements

This guide generously borrows from *How to Keep Union Records: A Guide to Local Officers and Staff* by Debra Bernhardt.

## INTRODUCTION

The national records of the Society of Women Engineers (SWE) are housed and maintained in a professional archive. This ensures that the history of the society as a whole will be preserved for posterity. While this does include some early records of professional sections, student sections, and regions, as SWE has grown exponentially, keeping these records in one central location became problematic. Yet, safeguarding these very records is vital to understanding the true nature of SWE: that it is made up of many groups of members across the country acting in their local arenas to affect change for women in engineering. To ensure that this history will be preserved, it is imperative that sections and regions adopt a records program.

This manual addresses the need for guidance for section and region officers on keeping their own records. It uses as a model, the program that the national officers and administration follow for preserving national SWE records. It incorporates practical information for the storing, filing, and saving or disposing of section and region records. In addition, it provides a glossary of records management terms. For more detailed assistance, please contact the SWE archivist.

This guide is not exhaustive, as sections and regions vary, but it should provide a framework that all can use as a basis for a records program. Keep in mind that different states have different legal record-keeping requirements and this guide should be used in conjunction with advice provided by local legal and fiscal counsel.

## **RECORDS MANAGEMENT**

With a volunteer professional organization, record keeping can be a challenge. Especially for older sections, the accumulation of material as officers change from one FY to the next can be overwhelming and chaotic. Officers often end up keeping records from their tenure in home offices, not knowing what to do with them. Things end up missing.

Records management brings your records under control and prevents such problems from occurring. It is a tool that insures the efficient and accurate creation, use, maintenance, and disposition of your records. It helps keep section and region officers well informed and effective. Finally, records management preserves the heritage and history of your section or region.

A sound records management program consists of five elements:

- Securing
- Filing
- Saving/disposing
- Protecting
- Preserving

This manual will discuss each of these. By understanding the concepts behind these elements, you can easily implement a records management program.

## RECORDS

Before going further, it might help to understand exactly what a record is. Records are all materials created, received, or used for official business of an organization. Various types of documents that may be in an officer's files are considered records. In other words, they consist of all the materials that your section or region generates *itself*, such as:

- Meeting minutes
- COR & treasurer's reports
- Memorandum and correspondence
- Award & scholarship nominations
- Membership records & rosters
- Election records
- Financial records, such as annual audits and reports
- Newsletters, flyers, awards programs, and other publications
- Regional Conference planning records, programs, and proceedings

Materials other than paper can be records, depending on the information they contain. These include:

- Photographs
- Videotapes
- Audiotapes
- Computer disks
- Electronic records

Some material not generated by sections or regions can also be considered records if they document them or place them in a historical context. These include:

- Newspaper clippings on section and region activities or members
- Local government or industry reports on women in engineering

Sometimes records are labeled according to the frequency of their use. *Inactive* or *noncurrent* records are those never or rarely used. *Current* records are those that are accessed frequently. More definitions can be found in the *Glossary*, p. 23.

## **SECURING RECORDS**

Section and region records are important SWE assets that document the activities of its members. Records created by section and region officers while conducting SWE business are the property of the section or region, not the individual.

Therefore, records should be kept in an orderly fashion and under direct local control. Records should be surrendered to the succeeding officer and the section/region should make arrangements with a local archival repository for regularly scheduled deposits of those records. Said repository then becomes responsible for their continued care. If space is an issue until the records can be deposited at a repository, the section or region can place inactive records in a secure storage facility (see *Retire noncurrent files to storage*, p. 10).

For information about archival repositories and local historical societies, see the section on *Preserving Records for Posterity*, p. 12.

## FILING RECORDS

You need to efficiently retrieve information in your section/region's files. How often have you wasted time searching for records because they were misfiled, because there are numerous filing systems, because there is no organization to the files, because of some previous filer's idiosyncrasies, or because the files are cluttered?

Key to timely retrieval is a single, simple, and logical filing system. An easy-to-follow system ensures accurate filing and retrieval. It maintains consistency in filing despite a change in officers from one FY to the next. Finally, such a system allows for easy identification and disposition, or removal, of inactive records.

There are eight suggestions to help you revise your current filing system, or establish a new one:

- Keep records of different officers or committees separate
- Divide records into official and reference files
- Separate records according to format
- Establish records series
- Arrange records within series
- Store records in filing cabinets
- Keep your files manageable
- Retire noncurrent files to storage

These points are explained in detail below.

### **Keep records of different officers or committees separate**

Keep files of each officer or committee separate from those of other officers or committees. This practice establishes groups of records within your section or region according to the creator – and therefore according to function. It prevents interfiling of records that are similar in type but actually differ in function.

### **Divide records into official and reference files**

*Official files* relate to your section or region's own activities. Examples include meeting minutes, officer's reports, newsletters, membership records, financial records, election records, and correspondence.

Reference files should contain materials that may provide you with information but do not directly relate to the work of your section or region. Reference files can consist of subject files, which contain externally published materials like the SWE Magazine or other SWE national publications, other engineering or general periodicals, and government reports. Such items should be kept separate from the official files because they do not have long-term value. Discard reference files when they are no longer useful. *Exceptions include national SWE publications, like the magazine. Please check with the SWE archivist before disposing. Also, newspaper clippings or magazine articles written*

*about your section/region or a section/region member and reports on women in engineering in your geographical area, should be kept.*

**Separate records according to format**

Keep records of different formats separate from each other. In other words, do not interfile CDs, DVDs, photographs, etc. with your paper records. Store all items of a particular format together in proper containers.

**Establish record series**

Further divide section/region records by establishing record series. A record series is a group of records that are similar in type; that relate to a particular subject or function; or that are created because of a particular activity. For SWE section and region records, dividing records into three basic series is sufficient: office files, publications, and subject files.

A records survey is a good way to list the contents of your records. Through the survey, you compile information about your record series in to a records inventory. Each inventory sheet will indicate the size, arrangement, dates, storage, and content for a particular series. It will give you a good overall picture of your records. See *Appendix 1A*, p. 15 for an example. Once you have completed the records inventory, keep it accessible in a central location, such as online.

**Arrange records within series**

Arrange files and records within series for the most convenient retrieval. Examples of standard filing practices for particular series follow:

<b>Series</b>	<b>Arrangement</b>
Office Files	alphabetically by type, subject, or activity; then by date
Publications	alphabetically by name or function; then by date
Subject Files	alphabetical by type or subject; then by date

**Use proper storage for records**

Paper records should be stored in standard cardboard record storage boxes (available at most office supply stores). If the items are especially valuable (e.g. original charter), store them in a fire resistant box or cabinet. Keep records in letter size file folders (8 1/2” x 11”) unless more than 25% of them are legal size (8 1/2” x 14”).

Label a file box with each record series title and the beginning year included in the box:

- Office Files, 1990 -
- Publications, 1990 -

Every folder in each box should be accurately labeled with at least the type/subject/activity included and the date of the earliest document in the file. When you type your box inventory, you will then include records series (see *Appendix 1B*, p. 16 for an example of a box inventory). A single folder of current records should have no more than five years of documents in it. If you are no longer filing records into a folder, put the date of the latest document on the folder label:

President; Correspondence, 1988-1990  
Newsletter, 1985 - 1990

### **Keep your files manageable**

After your filing system is set up, it must be maintained properly. In addition to filing documents in the correct place, you should avoid cluttering your files. The following pointers provide some guidelines.

- *Do not keep externally published materials (magazines, journals, books, newspapers) in these files.* An exception is for articles about your section/region or a section/region member. These should be clipped out of the publication, if possible, photocopied on acid-free paper (most bond paper is acid-free), and the photocopy of the original filed. Be sure to indicate the name and date of the periodical or newspaper on the copy.
- *Do not file duplicates.* It is less expensive to make copies on demand. This rule also applies to publications your section/region has produced: you should keep only one copy as your record copy.
- *Do not file routine materials, such as letters of transmittal, form letters, rough drafts, phone messages, cover letters, or anything illegible.* If such items are needed for a brief period, keep them in a special “day” file and then discard them when they are no longer useful. With form letters, keep only one copy and write “acknowledged” next to each name. Do not keep a separate copy of each one sent! On the other hand, some “routine” materials may have annotations on them such as important comments, recommendations, or decisions that add significantly to a proper understanding of the section/region’s business. They should be retained as part of the official files.
- *File records each day to avoid a backlog.* Place the most recent records in the front of the folders.
- *Do not stuff your file folders.* They are designed to hold about 3/4” of paper. Make a second folder with the same heading if there are too many records to fit in one.

### **Retire noncurrent files to storage**

As file drawers or boxes become full, remove older materials to a central storage center. If you refer to a file less than once in six months, transfer it to free up space. The following pointers will guide you in retiring records:

- Retire groups of related files together and replace with a new set of file folders. For instance, retire at one time all your correspondence files for a particular period.
- Make sure there is a closing date for each folder that you are retiring. For example:  
Minutes, 1988-1990
- Use standard, uniform size, commercially available records storage containers.
- When transferring files to storage containers, keep them in order and place them vertically in the box.
- Accurately label the contents on the front of the container. For example: Office Files:  
Correspondence; Secretary, 1988-1990
- Make sure you follow these rules when placing records in your home office or off-site storage facility:
  1. Maintain a constant environment – by avoiding extremes in temperature and humidity – to preserve the useful life of your records.
  2. Never place boxes on damp floors, near leaky walls, or in direct sunlight.
  3. Make sure that records are always stored at least 3” above the floor.

Additional rules can be found in *Appendix 3, Dos and Don'ts*, p. 21

## SAVING AND DISPOSING OF RECORDS

Permanently keep only those items required by law and those that are important in recording the history of your section/region. In other words, keep files with administrative, legal, and historical value. Quite often, of course, these values overlap. For example:

The following items should be kept because of their *administrative value*:

- Charter
- Membership records
- Minutes
- Election records

These items should also be kept because of their *historical value*. They include:

- Correspondence
- Reports
- Photographs
- Clippings
- Tape recordings
- Newsletters and flyers
- Scrapbooks

In general, save those records that document the when, where, why, and how of your section/region's history. These records should show how the section/region began, why it did or did not flourish, who held office, how decisions were made, what the priorities were, and how the section/region changed over time.

Records with *legal value* are those that federal or state laws require you to keep.

*Disposition* – removing records from your files and targeting them for destruction or permanent storage – should be done systematically. Before anything is destroyed, you should create a *retention and disposal schedule*. This schedule lists those record series for which records should be retained and those for which records should be destroyed. It should also indicate the retention period – the length of time for keeping records prior to storage or destruction – for each series. A suggested schedule, based on the types of material likely held by a section/region, is provided in *Appendix 1C*, p. 17.

A retention and disposition schedule helps ensure an orderly flow of records from creation to disposition and consistency from one FY to the next.

## PRESERVING RECORDS FOR POSTERITY

Living human memory quickly dims with time. Therefore, history is usually written from surviving records. To insure that the history of women in engineering, and SWE's part in it, is fully and accurately told, you must take certain steps for the physical preservation of important records.

One way to ensure the preservation of your records is to maintain your section/region's control over them. All records must remain with the section/region when officers change from one FY to the next.

Another way of preserving your records is to transfer inactive historical records to an outside archival institution that can care for you records' physical state. Paper, magnetic tape, CDs & DVDs, and photographs all decompose over time, especially if kept under unstable environmental conditions.

*Finding an archives.* Archives are specialized repositories that contain original and unique research materials. These materials are generally not published items such as books and periodicals. Archives are typically located in universities and historical societies. Archivists are professionals trained to appraise the long-term historical value of organizational records and personal papers. They organize and catalog these materials and assist researchers using them.

When considering an archival institution as the repository for your historical records, you can expect the following:

1. The archivists will want to survey your historical records to determine whether they fall within the collecting area or stated purpose of their archives. If interested, they will negotiate for the transfer of records from your section/region to their institution. If they are not interested, ask them to recommend another archives that might be.
2. When negotiating for transfer, work with the archivists to draw up a contract (sometimes called a deed of gift). The agreement should stipulate the terms of the transfer and the responsibilities of both parties. It should include:
  - *A statement of ownership.* You may want to retain ownership in order to terminate the agreement with the archives and regain possession of your records. Many repositories, however, ask that the donor agree to deed the property to the archives or the public.
  - *Copying privileges.* Many archives request a transfer of copyright or permission to copy the records. This will facilitate researcher use of the materials.
  - *Services the archives will provide to the section/region.* Many archives assist with current records management. You can enlist the archivist's assistance in setting up your retention and disposition schedule. The schedule can then be

adapted to indicate when historic materials should be transferred to the archives.

Other services you might ask the archives to provide include the following: copies of the preliminary inventory and completed finding aid, access to your files during business hours, photocopies upon request, and return of original records when necessary (for legal or exhibit purposes).

3. Once the contract has been signed, the archives will box your records (if they're not already) in the order you kept them and arrange for their transfer.
4. Eventually the staff will clean your records, arrange them in acid-free folders and boxes, and store them in a controlled environment that will prolong their life. They will also create the finding aid, which should include a brief history of your section/region, a general description of the records, and an inventory or listing of the boxes.

## ELECTRONIC RECORDS MANAGEMENT

Most business today is done electronically. Correspondence is primarily by email; documents are created and stored as electronic files. While computer technology has made transacting business much easier, it does not alleviate problems associated with records storage. In fact, it adds a whole new dimension that is still being fully explored. However, the basic procedures for managing paper records, as discussed in this manual, apply also to electronic records.

Managing the data stored in a computer is essentially the same as how you'd manage hard copy filing systems. Instead of writing the type/subject/activity included on physical folders, you create electronic folders using these same titles. Documents are then stored in these folders based on your records retention schedule. Retiring inactive records could be as simple as copying the files to media (e.g. CD, DVD, external hard drive).

There are recommended practices unique to electronic files. These include:

- *Save files in an open source format, such as pdf for text files and jpeg for image files.* This ensures the likelihood of their being accessed many years from their creation.
- *Establish a back up procedure.* Electronic records are highly susceptible to loss. Make sure you are saving your computer files in two separate places (e.g. hard drive and CD).
- *Understand the limits of storage media.* While we know that paper can last thousands of years, we are still unsure how long electronic storage media will last. We also have to contend with the rapid obsolescence of hardware. Make sure you set up a schedule for migrating your data from one storage media to the next, even if you're using the same format (e.g. from one CD to another CD).
- *Use standardized subject lines for emails.* Create a list of subject lines to encompass all business correspondence and use them on a consistent basis. This will make it easier to know which emails to save and which ones you can delete. For all reply emails, use the setting that includes the original message in the reply message, so that you only need save the last email sent instead of each separate email.
- *Capture online content at least once every FY and every time there is a major redesign.* Web sites are communication vehicles and as such may contain information not captured elsewhere. Since content is constantly changing, it is virtually impossible to document every change, but you can and should plan to permanently save the site at regular intervals. The best scenario would be to encapsulate the look and feel of the site, as well as the content, by taking screen shots. If that is not possible, then content, at the very least, should be downloaded.

## Appendix 1A: EXAMPLE OF A RECORDS INVENTORY

<b>1. OFFICE</b> Golden Gate Section	<b>2. DATE</b> 11/1/07
<b>3. SERIES TITLE</b> Office Files	<b>4. INVENTORY BY</b> Deborah Rice
<b>5. LOCATION</b> Current: President's residence Back to 1974: storage unit	<b>6. INCLUSIVE DATES</b> 1974 - present
<b>7. DESCRIPTION</b> Officer correspondence and reports, newsletters, awards & scholarship nominations, awards banquet materials, newspaper clippings, meeting minutes, membership records, election records, financial records, and photographs	
<b>8. FORMAT</b> Letter-size paper, newspaper clippings, publications, photographs, electronic files	<b>9. DUPLICATION:</b> Are documents available in another place or format? Yes. Some electronic records also exist as paper records.
<b>10. ARRANGEMENT (alphabetical, chronological, numerical, other)</b> Chronological by year, then alphabetical by subject.	
<b>11. VOLUME</b> 2003 - current: 10 CDs, 1/4 file drawer 1974 – 2002: 50 records center boxes	<b>12. ANNUAL ACCUMULATION</b> 2 CDs, 1-2 file folders
<b>13. FILE BREAK (FY, calendar year, other)</b> FY	<b>14. VITAL RECORDS</b> charter
<b>15. REFERENCE USE (after cutoff)</b> <u>4 times</u> a month For how long after cutoff? 1 FY	
<b>16. DISPOSITION:</b> Does the series have an approved retention & disposal schedule?  No. <i>Recommend:</i> Total retention: permanent  In office: 1 FY  In storage: 5 FY  Final Disposition: local archives	

## **Appendix 1B: EXAMPLE OF A BOX INVENTORY**

### Los Angeles Section: 50 Boxes

#### Box 1

##### Office Files

1. Career Guidance Committee, 1988
2. Meeting minutes, 1990, 1 of 3
3. Meeting minutes, 1990, 2 of 3
4. Meeting minutes, 1990, 3 of 3

##### Publications


1. Newsletters, 1988-1990
2. Flyers, 1988-1990

#### Box 2

##### Subject Files

1. Newspaper clippings, 1970 –1990
2. Articles, 1970 – 1990

## Appendix 1C: SUGGESTED RETENTION & DISPOSAL SCHEDULE

 <b>Society of Women Engineers (SWE)</b> <b>Retention &amp; Disposal Schedule</b>					
<b>DEPARTMENT OR OFFICE:</b> SECTIONS & REGIONS		<b>GENERAL NOTES:</b> Governs both paper and electronic records.			
<b>SUBDIVISION:</b> OFFICE FILES					
<b>DESCRIPTION:</b> Business records					
<b>DATE PREPARED:</b> 11/1/07					
Item No.	Description of Records	Retain in Office (active records)	Retain In Storage (semi-active records)	Destroy After	Permanent to Archives (inactive records)
1	CORRESPONDENCE	Current FY + 1	5-10 years		X
2	COR REPORTS	Current FY + 1	5-10 year		X
3	MEMBERSHIP RECORDS	Current	Inactive, 5-10 years		X
4	LEADERSHIP ROSTERS	Current FY + 1	5-10 years		X
5	ELECTION BALLOTS	1 year		1 year	
6	ELECTION RESULTS	1 year	5-10 years		X
7	REGION CONFERENCE PROGRAMS & PROCEEDINGS	Current FY + 1	5-10 years		X
8	REGION CONFERENCE PLANNING FILES (sales contracts & agreements, room lists, attendees, & related records)	Current FY + 4		5 years	X

9	MEETING MINUTES	Current FY + 1	5-10 years		X
10	TREASURER'S REPORT	Current FY + 1	5-10 years		X
11	ANNUAL AUDIT	Current FY + 4	5 years		X
12	ANNUAL BUDGET	Current FY + 1	5-10 years		X
13	SCHOLARSHIP NOMINATIONS	Current FY + 1	5-10 years		X
14	DAILY FINANCIAL LEDGER	Current FY + 1	6 years	8 years	
15	AWARDS NOMINATIONS	Current FY + 1	5-10 years		X
16	AWARDS BANQUESTS & OTHER EVENTS	Current FY + 1	5-10 years		X
17	COMMITTEES (rosters, meeting minutes, reports, activities)	Current FY + 1	5-10 years		X
18	SPECIAL PROJECTS	Current FY + 1	5-10 years		X
19	SECTION PROCEDURES	Current		superceded	
20	HISTORICAL MATERIALS (section/region history, scrapbooks, photographs, audio/video tape)	Current FY + 5	5 years		X
21	CHARTER	1 copy			X



**Society of Women Engineers (SWE)**  
**Retention & Disposal Schedule**

<b>DEPARTMENT OR OFFICE:</b> SECTIONS & REGIONS	<b>GENERAL NOTES:</b> Governs both paper and electronic records.
<b>SUBDIVISION:</b> PUBLICATIONS	
<b>DESCRIPTION:</b> Material published by the section or region.	
<b>DATE PREPARED:</b> 11/1/07	

Item No.	Description of Records	Retain in Office (active records)	Retain In Storage (semi-active records)	Destroy After	Permanent to Archives (inactive records)
1	NEWSLETTERS	Current FY + 1	5-10 years		X
2	BROCHURES	Current FY + 1	5-10 years		X
3	FLYERS	Current FY + 1	5-10 years		X
4	CAREER GUIDANCE	Current FY + 1	5-10 years		X
5					
6					
7					
8					



*Society of Women Engineers (SWE)*  
Retention & Disposal Schedule

<p><b>DEPARTMENT OR OFFICE:</b> SECTIONS &amp; REGIONS</p> <p><b>SUBDIVISION:</b> SUBJECT FILES</p> <p><b>DESCRIPTION:</b> Material collected about the section, region, or its members.</p> <p><b>DATE PREPARED:</b> 11/1/07</p>	<p><b>GENERAL NOTES:</b> Governs both paper and electronic records.</p>
---	---

Item No.	Description of Records	Retain in Office (active records)	Retain In Storage (semi-active records)	Destroy After	Permanent to Archives (inactive records)
1	NEWSPAPER CLIPPINGS	Current FY + 5	5-10 years		X
2	REPORTS	Current FY + 1	5-10 years		X
3	ARTICLES (by or about members)	Current FY + 5	5-10 years		X
4	SWE Magazine	Current FY		X	
5	INDUSTRY & GENERAL PERIODICALS	Current FY		X	
6	BOOKS	Current		X	
7					
8					

## Appendix 2: QUICK REFERENCE: DOS AND DON'TS

This section lists tips for preserving and keeping accurate and complete records. Please refer to the manual for detailed descriptions of procedures.

1. **DO** keep records together by creator. For example, keep all records of the section president (correspondence and reports) together; do not file just as “reports.”
2. **DO** keep copies of **meeting transcripts or minutes**.
3. **DO** keep copies of **newsletters, reports, flyers, and other section or region publications**.
4. **DO** keep financial summaries, such as treasurer’s reports and budgets—**ANNUAL ONLY**.
5. **DO** keep **photographs, sound recordings, videotapes, motion picture footage, posters, artwork and objects** that are relevant to your section/region history.
6. **DO** box records for storage in **standard records center containers**. These are cardboard boxes with the dimensions, 12" x 15" x 10", that can handle both letter and legal size folders. Tops are included with the box. Containers are generally available from your local office supply store. There are many companies that produce storage boxes. Listed below are brands of storage containers that are acceptable for archival use and the stock or model number of each.
  - Fellowes Econo/Stor #703
  - Quill Corp. Storage Case #7-30057
  - Stor-a-way No. 01125
  - Stor-a-way No. 81916
  - Universal Office Products #95223
  - Perma® 100 Stock No. 40000
  - Paige Miracle Box No. 15
  - Perma-Pak Portable Storage Box #01215
  - Acorn Victory 925
  - R-Kive No. 725
  - Perma-Products Stor-All #03325
  - Bankers Box 703
  - Bankers Box Recycled Series 770
  - Bankers Box Budget/Stor 603
  - Enviro Stor Bankers Box 972
7. **DO** keep records in **manila folders that are accurately labeled**. Ideally, the folder label should contain three types of information: the subject matter, the type of record, and the inclusive dates of the material.

Ex. Career Guidance Committee; Meeting Minutes, 1988-1990

If many different types of records exist in one folder, simply include the subject and the inclusive dates.

Ex. Career Guidance Committee, 1988-1990

8. **DO create a listing of every file folder heading for each box of records.** Make sure that the folder heading listing corresponds to your box numbers and falls under the correct series title. This is a *box inventory* (see Appendix 1B for an example). Include the name of your section/region and the total number of boxes on the inventory.
9. **DON'T** keep multiple copies of brochures, pamphlets, printed materials, reports or other records produced by your section/region. In general, retain no more than two copies, maximum.
10. **DON'T** keep routine financial forms such as cancelled checks, bank statements, invoices, etc. **Tax forms should be retained in the active files during the period you may be audited.** Retain routine financial files until they can be discarded or destroyed.
11. **DON'T** keep popular magazines and journals such as *Time*, *Life*, *Newsweek* or *National Geographic* or any publication not produced by your section/region. Exceptions are reports relevant to women in engineering in your area or local newspaper clippings.
12. **DON'T** store loose papers. **Loose papers should be placed in folders when boxing records for storage.** Use the proper size folder for the proper size document.
13. **DON'T** store records in binders. **Remove the paper(s) from the binder(s) and place the sheets in manila folders.** Make sure to label the folder to identify the folder contents.

For example, “Meeting Minutes, 1980-1990” are filed in one binder. You remove the items and place them in three folders. Folders are then labeled as follows:

“Meeting Minutes, 1980-1983, 1 of 3”

“Meeting Minutes, 1984-1987, 2 of 3”

“Meeting Minutes, 1987-1990, 3 of 3”

14. **DON'T** store records in hanging folders—commonly referred to by the brand name Pendaflex®. Remove only the internal folders, or folder loose materials, if removing records from a file cabinet for storage.

Archival storage boxes are not designed to hold Pendaflex folders and they take up a lot of space.

### **Appendix 3: LIBRARIES & ARCHIVES WITH SCIENCE, ENGINEERING, AND/OR WOMEN'S HISTORY COLLECTIONS**

#### Iowa

Archives of Women in Science and Engineering, Special Collections Department, 403  
Parks Library, Iowa State University, Ames, IA 50011-4120; (515) 294-6672;  
archives@iastate.edu

#### New York

Institute Archives and Special Collections, Rensselaer Research Libraries, Rensselaer  
Polytechnic Institute, 110 8<sup>th</sup> St., Troy, NY 12180-3590;  
[www.lib.rpi.edu/dept/library/html/Archives/index.html](http://www.lib.rpi.edu/dept/library/html/Archives/index.html)

#### Virginia

Special Collections, Digital Library & Archives, University Libraries, Virginia Tech,  
P.O. Box 90001, Blacksburg, VA 24062-9001; [spec.lib.vt.edu/mss/msshpm.htm](http://spec.lib.vt.edu/mss/msshpm.htm)

## GLOSSARY

<b>Active Records</b>	See <i>current records</i> .
<b>Appraisal</b>	The process of determining the worth and thus the disposition of records based on their long-term legal, fiscal, administrative, and historical values.
<b>Archives</b>	<ol style="list-style-type: none"><li>1. Departmental or institutional records deemed worthy of permanent preservation because of their legal, fiscal, administrative, and historical value; also called archival materials or archival holdings.</li><li>2. The agency responsible for administering archival material.</li></ol>
<b>Current Records</b>	Records necessary for conducting current business, and therefore kept with the current officers. Generally, current records are those referenced at least once a month. Also referred to as <i>active records</i> .
<b>Disposal</b>	The action taken regarding temporary records after their retention periods expire. It occurs with records that lack permanent value and usually entails destruction of records. When in doubt about the value of any records, contact the SWE archivist.
<b>Disposition</b>	The action taken with regard to records following their appraisal. Types of disposition include transfer for temporary storage, permanent retention, and destruction.
<b>Evidential Value</b>	The value of records or papers as documentation of the operations and activities of the records-creating organization, institution, or individual.
<b>Inactive Records</b>	See <i>noncurrent records</i> .
<b>Inventory</b>	See <i>records inventory</i> .
<b>Electronic Records</b>	Records that are in a form that can only be accessed through a computer: for example, files created through word processing, database, or spreadsheet programs.
<b>Noncurrent Records</b>	Records no longer required in the conduct of current business. They are ready for final disposition. Also referred to as <i>inactive records</i> . See also <i>current records</i> and <i>semicurrent records</i> .

<b>Record Series</b>	Groups of related records that are normally maintained as a unit and that permit evaluation as a unit for retention scheduling purposes. Record series are comprised of records that are filed together and have a similar physical format, relate to a particular subject or function, or result from a particular activity.
<b>Records</b>	All recorded information (regardless of medium or format) created or received and maintained by an organization in pursuit of its activities.
<b>Records Inventory</b>	<ol style="list-style-type: none"> <li>1. A listing of a section/region's records</li> <li>2. In archival terms, a finding aid that generally provides a history of the organization creating the records, a description of the records, and a listing of the records series.</li> </ol>
<b>Records Management</b>	That area of general administrative management concerned with achieving accuracy, economy, and efficiency in the creation, use, maintenance, and disposition of records.
<b>Records Survey</b>	The process of making a complete and accurate listing of the records maintained by a section or region.
<b>Retention and Disposition Schedule</b>	An approved list that identifies the length of time record series must be retained. Such a schedule includes instructions for final disposition and the length of the retention period. Also called a <i>records schedule</i> .
<b>Retention Period</b>	The length of time that records must be kept before disposition. Usually expressed in terms of months or years but sometimes expressed as contingent upon the concurrence of an event, such as an audit. Permanently valuable materials have an indefinite retention period.
<b>Semicurrent Records</b>	Records required so infrequently in the conduct of current business that they should be transferred to storage, but are not yet ready for final disposition. See also <i>current records</i> .
<b>Survey</b>	See <i>records survey</i> .
<b>Vital Records</b>	Records that must be protected in order to resume operations in the event of a disaster, those necessary to recreate the section/region's legal and financial position, and those necessary to preserve the rights of the organization and its employees.