

Records Retention Procedures of the Oral History Association

Section 1 - Governing Documents			
Record Type	Description	Retention Type	Disposition
Bylaws		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Constitution		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Position Statements		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Standing Resolutions		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.

Section 2 - Committee, Task Force, and Caucus Records			
Record Type	Description	Retention Type	Disposition
Standing Committees			
Charge		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Correspondence	Official	PERMANENT	Transfer copies to

	correspondence, for example, sent to OHA Executive Office or OHA Council, which does not include routine messaging among the committee. Email communications of chairs/co-chairs only.		the OHA Archives for permanent retention after calendar year.
Meeting Minutes		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Reports	Includes Mid-Winter and Annual Meeting reports submitted to Council	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use
Award Committees			
Application Packets	All application material for nominees not chosen for award. Includes but is not limited to: nomination forms, nominee	TEMPORARY	Retain records for five (5) years for administrative use

	information form, curriculum vitae and biographical information of the nominee, letters of support for the nomination		
Award Recipient Information	Includes but is not limited to: nomination forms, nominee information form, curriculum vitae and biographical information of the nominee, letters of support for the nomination, photographs of the nominee, correspondence between the nominee and committee	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Charge		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Correspondence	Official correspondence, for example sent to OHA Executive Office or OHA Council, which does not include routine messaging among the committee. Email communications of chairs/co-chairs only.	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.

Meeting Minutes		PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Working Files	Includes but is not limited to: reviews of nominated works, scoring sheets, correspondence with judges, and other related records documenting the selection process.	TEMPORARY	Retain records for three (3) years for administrative use
Task Forces			
Charge		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Correspondence	Official correspondence, for example sent to OHA Executive Office or OHA Council, which does not include routine messaging among the committee. Email communications of chairs/co-chairs only.	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Meeting Minutes		PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Reports		PERMANENT	Transfer copy to the

			OHA Archives for permanent retention after calendar year.
Working Files	Files created in the process of some operation. Includes but not limited to: notes, drafts, and calculations created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use
Caucuses			
Correspondence	Official correspondence, for example sent to OHA Executive Office or OHA Council, which does not include routine messaging among the committee. Email communications of chairs/co-chairs only.	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Meeting Minutes		PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Membership Roster	Caucus co-chairs and membership to be reported at each annual meeting	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.

Section 3 - Council Records

Record Type	Description	Retention Type	Disposition
Official Correspondence	Official correspondence, for example sent to OHA Executive Office or OHA Council, which does not include routine messaging among the council. Email communications of elected officers only.	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Routine Correspondence	Routine correspondence documents day-to-day activities, including but not limited to: customer/member service, procurement, or internal communication	TEMPORARY	Retain records for three (3) years for administrative use
Meeting Materials	Includes but is not limited to: agendas, minutes, and other materials distributed	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations created and acquired in the process of assembling a final	TEMPORARY	Retain records for three (3) years for administrative use

	version of a document.		
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Section 4 - Executive Office Records			
Record Type	Description	Retention Type	Disposition
Agreements	Includes but is not limited to: memoranda of understanding, memoranda of agreements, legal agreements	TEMPORARY	Retain records for three (10) years after termination of agreement for administrative use
Annual Business Meeting Materials	Includes but is not limited to: agendas, minutes, and other materials distributed	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Awards	Includes but is not limited to: award descriptions, lists of awardees, endowment details	PERMANENT	Transfer copies to the OHA Archives for permanent retention after five (5) years after awarded.
Communication			
E-blasts		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation.
Press Releases		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation.
Social Media Feeds		TEMPORARY	Retain records for five (5) years for

			administrative use
Website	Includes primary OHA domain, as well as OHR blog subdomain	PERMANENT	Continuously archived via Archive.org API
Contracts	Includes official copies only	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Correspondence	Routine correspondence documents day-to-day activities, including but not limited to: customer/member service, procurement, or internal communication	TEMPORARY	Retain records for three (3) years for administrative use
Election and Appointment Records	Includes ballot slates, results data, rosters, and official letters of appointment	PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation.
Finances			
Accounts Payable		TEMPORARY	Retain records for three (3) years for administrative use
Accounts Receivable		TEMPORARY	Retain records for three (3) years for administrative use
Annual Financial Reports	Working files not included	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Audit Reports		PERMANENT	Transfer copy to the

			OHA Archives for permanent retention seven (7) years after creation.
Chart of Accounts (General Ledger)		TEMPORARY	Retain records for three (3) years for administrative use
Final Budgets		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Financial Statements		TEMPORARY	Retain records for three (3) years for administrative use
Income Tax Returns		PERMANENT	Transfer copy to the OHA Archives for permanent retention four (4) years after creation.
Working Budgets		TEMPORARY	Retain records for three (3) years for administrative use
Fundraising Records			
Forms		TEMPORARY	Retain records for three (3) years for administrative use
Letters		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation
Reports		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation

Grants			
Documentation		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation
Final Reports		PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation
Proposals - Accepted		TEMPORARY	Retain records for three (3) years for administrative use
Proposals - Not Accepted		TEMPORARY	Retain records for three (3) years for administrative use
Institutional Hosting Records	Includes proposals, committee review/decisions	PERMANENT	Transfer copies to the OHA Archives for permanent retention five (5) years after creation
Insurance Records		TEMPORARY	Retain records until superseded or plan terminated.
Leases		TEMPORARY	Retain records until superseded or plan terminated.
Personnel Files	Includes but is not limited to: job applications, contracts, benefit packages, annual review documents	TEMPORARY	Retain records for five (5) years for administrative use
Professional Marketing Materials		TEMPORARY	Retain records for three (3) years for administrative use

Reports to Council		TEMPORARY	Retain records for three (3) years for administrative use
Statements, Speeches, and Presentations		TEMPORARY	Retain records for three (3) years for administrative use
Trademarks, Patents, and Copyright Designations		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.

Section 5 - Membership Records			
Record Type	Description	Retention Type	Disposition
Member Database	Includes records of all members, which is available through the membership platform to Executive Office administrators	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Member Directory Dataset	Includes data of members who opt in to the member-search directory	TEMPORARY	Retain records for three (3) years for administrative use
Find an Oral Historian Directory Dataset	Includes data of members who opt in to the public website directory	TEMPORARY	Retain records for three (3) years for administrative use

Section 6 - Programming Records			
Record Type	Description	Retention Type	Disposition
Annual Meeting			
Contracts			
AV Contracts	Either host hotel or external vendor contracts	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Artist Contract	Program cover created by local artist and compensated by OHA	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Event Contracts	Offsite events and tours	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Hotel Contract		TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Speaker Contracts	Keynote and Plenary Speakers	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Workshop Contracts	Pre-conference workshops by OHA members	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Feedback Survey	Membership survey distributed post-conference	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Fundraising	Includes but is not limited to: grant applications, solicitation letters	TEMPORARY	Retain records for five (5) years after end of contract for

			administrative use
Hotel Meeting Room Assignments and Other Meeting Logistics		TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Local Arrangement Committee			
Correspondence	Routine correspondence documents day-to-day activities, including but not limited to: customer/member service, procurement, or internal communication	TEMPORARY	Retain records for three (3) years for administrative use
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use
Meeting Branding Artwork	Includes but is not limited to: program cover artwork, stickers, buttons, bags, and other conference swag	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Photographs	Includes but is not limited to: official OHA photography as well as candid photography contributed by	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.

	attendees		
Program Committee			
Correspondence	Routine correspondence documents day-to-day activities, including but not limited to: customer/member service, procurement, or internal communication	TEMPORARY	Retain records for three (3) years for administrative use
Final Program	Both physical and digital versions	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Preliminary Program		TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use
Promotional Materials	Includes but is not limited to: flyers, social media posts, and other marketing materials	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Registration Data		PERMANENT	Transfer copy to the OHA Archives for

			permanent retention after calendar year.
Session Recordings		PERMANENT	Transfer preservation copies to the OHA Archives for permanent retention after calendar year.
Working Budget	Includes but is not limited to: initial Executive Office budget, working budgets	TEMPORARY	Retain records for three (3) years for administrative use
Symposia			
Feedback Survey	Attendee survey distributed post-conference	TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Program Committee			
Correspondence	Routine correspondence documents day-to-day activities, including but not limited to: customer/member service, procurement, or internal communication	TEMPORARY	Retain records for three (3) years for administrative use
Final Program	Both physical and digital versions	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Preliminary Program		TEMPORARY	Retain records for five (5) years after

			end of contract for administrative use
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use
Promotional Materials		TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Registration Data		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Session Recordings		PERMANENT	Transfer preservation copies to the OHA Archives for permanent retention after calendar year.
Webinars			
Promotional Materials		TEMPORARY	Retain records for five (5) years after end of contract for administrative use
Registration Data		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.

Session Recordings		PERMANENT	Transfer preservation copies to the OHA Archives for permanent retention after calendar year.
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Section 7 - Publications and Related Records			
Record Type	Description	Retention Type	Disposition
A Guide to Oral History and the Law	Both physical and digital versions	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.per edition released
Best Practices, Guidelines, and Toolkits		PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.per resource released
OHA Newsletter			
Digital Versions	PDF files of distributed email content	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Reports to Council	Provided biannually to OHA Council by the newsletter editor	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
OHA Pamphlet Series	Both physical and digital versions	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.per

			resource released
Oral History Review			
Author Contracts	Right-to-publish contracts signed by content authors	TEMPORARY	Retain records for seven (7) years for administrative use
Correspondence	Official correspondence, for example, sent to OHA Executive Office or OHA Council, which does not include routine messaging among the committee. Email communications of lead editor only.	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Digital Versions	One volume containing two issues released per year	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Editorial Board Meeting Materials	Includes but is not limited to: agendas, minutes, and other materials distributed	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Editorial Staff Meeting Materials	Includes but is not limited to: agendas, minutes, and other materials distributed	PERMANENT	Transfer copies to the OHA Archives for permanent retention after calendar year.
Print Versions	One volume containing two issues released per year	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Reports from Publisher	Provided annually to the OHA by the	PERMANENT	Transfer copy to the OHA Archives for

	press publishing the journal		permanent retention after calendar year.
Reports to Council	Provided biannually to OHA Council by the OHR editors	PERMANENT	Transfer copy to the OHA Archives for permanent retention after calendar year.
Working Files	Files created in the process of some operation. Includes but not limited to notes, drafts, and calculations, created and acquired in the process of assembling a final version of a document.	TEMPORARY	Retain records for three (3) years for administrative use

Revision Log

Procedures Established: 10-15-2025