

## **DISPOSITION/RETENTION OF ATOS RECORDS AND PRINTED MATERIALS**

June 4, 2013

As most of you know, five 4-drawer file cabinets that contain years and years of records (non-phonograph) and printed materials were taken from the then ATOS Archive and Library at the University of Oklahoma and shipped to my home last fall. The objective was to ensure their safe keeping in a place within the ATOS organization as they would remain the property of ATOS.

My assumed task was to provide that safe keeping and at the same time organize the stuff, digitize applicable materials and be able to receive other materials from the Board and Staff as they needed to have a home. It should be noted that very little if anything has been added to the collection since around 2005 which means that there is a lot of materials in people's homes and basements which should be sent to this historical file.

The question is what should be saved and what could be discarded? The more specific question I have is in the area of financial records. There are years and years of cancelled checks, bank statements, receipts, invoices, travel reimbursement forms, etc., etc. some going back forty or more years. I really don't think that we need to keep those things for more than a few (perhaps five) years thus discarding most of that type of material. I feel that the other material like chapter charter agreements, incorporation documents, minutes of meetings, and things of that type should be retained and scanned. As of this time, I have scanned most of the minutes of meetings but still have retained the hard copy which we should do. We have lots of chapter newsletters which I think are valuable to keep not only for ATOS but for the chapters themselves. We haven't received many current ones and I hope we can start getting copies of newsletters for file.

I am asking that the Historian (incumbent: Jack Moelmann) be given the responsibility and authority to determine what materials will be kept, scanned, and what materials can be discarded other than financial records.

I further ask that I be given official guidance on the disposition or retention of financial records namely cancelled checks, bank statements, receipts, etc. I plan on going through those things prior to discarding them to help find financial information concerning past transactions with the Endowment Fund to fill in the blanks in the fund's accountability.

Respectfully submitted,

JACK MOELMANN, Historian