

## Oxfordshire History Centre: Guidelines for organisations on retention and disposal of records

This guidance is for organisations wishing to transfer their archives to Oxfordshire History Centre (OHC) for long-term preservation of and general access to the documents. It assumes that the records under consideration are no longer required for legal or administrative purposes.

Due to storage space and staff time, documents in the schedule marked 'destroy' should be disposed of by the organisation. Material earmarked for deposit at the History Centre should be box-listed prior to being brought in, so that staff are aware of the potential quantity and types. Ownership of the records can be retained by the organisation, or can be transferred to OHC. Any items which, after appraisal by OHC staff, are deemed unsuitable for permanent preservation will be offered back to the business or destroyed securely, depending on what was agreed at time of deposit.

For records not covered by the schedule below, or for any material held in digital form, please ask History Centre staff for specific advice.

Type of record	Action	Notes
<b>Administrative</b>		
Minutes	Transfer to OHC for permanent preservation	
Draft minutes	Destroy (if signed minutes exist)	
Correspondence on key policies, strategies or projects	Transfer to OHC for appraisal	
Routine correspondence, copies of circulars, appeals for charitable donations	Destroy	
Title deeds or other documents relating to title, acquisition, disposal or rights over a property	Transfer to OHC for appraisal	
Membership lists, registers, personnel records	Transfer to OHC for appraisal	
Annual reports of group activities	Transfer to OHC for appraisal	
<b>Financial</b>		If more than 7 years old
Annual audited accounts	Transfer to OHC for permanent preservation	
Cash/petty cash books	Transfer to OHC for appraisal	

Insurance policies	Transfer to OHC for appraisal	
Bank statements	Destroy	
Paying-in books	Transfer to OHC for appraisal	
Cheques and Cheque book stubs	Destroy	
Other subsidiary financial paperwork, draft accounts, monthly reconciliations	Destroy	
<b>Publicity</b>		N.B. OHC is unable to accept artefacts which may have formed part of promotional campaigns
Programmes	Transfer to OHC for appraisal	
Posters	Transfer to OHC for appraisal	
Scrapbooks	Transfer to OHC for appraisal	
Newsletters or magazines	Transfer to OHC for appraisal	
Photographs	Transfer to OHC for appraisal	
Presscuttings	Transfer to OHC for appraisal	
Press releases	Transfer to OHC for appraisal	
<b>Major Projects, Campaigns or Initiatives</b>		
Minutes, accounts, tenders, specifications, plans, buildings plans relating to each project	Transfer to OHC for appraisal	Project files should be weeded prior to transfer, to remove ephemeral or duplicate material
Invoices, receipts and vouchers	Destroy	

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