

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

This guidance is for organisations wishing to transfer their archives, including digital material, 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. Please keep the records together to reflect the way they were created, as far as possible, but do not re-package items (e.g. in plastic wallets) or use additional paper clips or staples.

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 organisation or destroyed securely, depending on what was agreed at time of deposit.

OHC is happy to accept born digital material, but please indicate before deposit the types of digital material you have. For records not covered by the schedule below, 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)	
Born digital minutes	Transfer to OHC for permanent preservation	Please ensure they are unique and not copies of originals
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 and registers	Transfer to OHC for permanent preservation	

Other personnel records	Transfer to OHC for appraisal	
Annual reports of group activities	Transfer to OHC for permanent preservation	
<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	
Invoices, receipts and vouchers and background audit paperwork	Destroy	
Born Digital accounts	Transfer to OHC for permanent preservation	Please ensure they are unique and not copies of originals
<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, including digital publications	Transfer to OHC for appraisal	May be transferred to Local Studies
Photographs, including digital images	Transfer to OHC for appraisal	
Presscuttings	Transfer to OHC for appraisal	
Press releases	Transfer to OHC for appraisal	

Histories/reminiscences	Transfer to OHC for appraisal	May be transferred to Local Studies
<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

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