

Records for Permanent Preservation

Key Records

The following records are of historical interest both to the business and the wider research and archive community.

- Constitutions/Rules/Memorandum & Articles of Association
- Statutory registers e.g. register of directors
- Board and committee minutes
- AGM minutes and papers
- Annual reports and accounts
- Summary membership records
- Publications produced by the business
- Photographs and publicity materials
- Scrap books and albums

Other Record Types

The following records should also be selected for permanent retention:

- Records that summarise the businesses key aims and objectives
- Records that record key events in the businesses history or local area
- Records that document the company's ownership of assets
- Records that document the businesses relationship with key bodies such as the local Council or industry bodies

Breakdown of Key Record Types

Corporate/ Governance

Memorandum and Articles of Association	Business continuity plans	Major contracts and agreements
Minutes	Company prospectus	Business plan
Annual Reports	Register of directors	Business correspondence
Directors' Reports	Register of shareholders	Company structure
Board papers	Trademarks and patent files	
	Major project files	

Financial

Journal ledgers	Annual accounts	Balance sheets
Day books	External audit reports	Profit/ loss sheets
Nominal and Private ledgers	Finance minutes	Pre 1920s invoices (if detailed)

Production

Stock books

Technical records: maps, plans, drawings

Repair books

Product files

Job files (particularly significant projects)

Laboratory books

Pattern books/ sample books

Glass plate negatives, photos, negatives of machinery/ products

Product manuals

Communications

Press cuttings and articles

Key media events

Corporate communications

Speeches

Company promotional brochures

Circulars to shareholders

Corporate correspondence

Human resources

Manuals and employee handbooks

Organisational charts

Performance management

Training manuals and literature

Accident register

Staff records

Photos of awards, sports and social events

Staff photos

Wages books

Staff clubs and societies

Staff magazines and publications

Memorials/ plaques

Committee minutes

Property records

Property deeds

Asset registers

Photographs of premises

Architectural plans and drawings of site/ buildings

Sales and marketing

Advertising material

Product packaging, samples, pattern books

Point of Sale

Marketing campaign literature

Brochures

Market research

Major customer files

Marketing plans (target customers etc)

Order books

Price lists

Product and service catalogues

Launch events

Sales figures

Technical records

Plans, drawings and photographs of products

General arrangement/ as built plans/ final drawings

Sketches (for 'significant' projects)

Record sets

Objects

Memorabilia

Glasses, jugs, awards, certificates

Advertising

Point of Sale

Artwork

Signs

NOT to be archived

Post 1920s invoices, cheque stubs, bank books, receipts

Publications by trade associations that can be found in libraries

Quotations

Medals/ trophies/ objects

Other companies' manuals/ advertising

Tender documents

Cash books (only retain if top level ledgers are missing)

Shareholding vouchers

Daily timesheets

Duplicates

Postal books

Timetables

Daily work in progress sheets

petty cash

Plans and maps duplicated elsewhere

Superseded plans