

Suggested retention schedule for arts organisations, charities and community groups

Introduction

Retention schedules are used to determine how long records should be kept. Please note the retention schedule applies equally to electronic and paper information. The following points may assist with deciding what to keep:

- Where detailed minutes survive there should be less need to preserve large amounts of correspondence.
- A filing system arranged by subject can ease considerably the process of selecting material on important issues.
- Important files can often be overloaded with material of an ephemeral nature; it is a good idea therefore to remove such papers from the files at regular intervals.

Records to be preserved permanently at the Dorset History Centre

Type of record	Additional information
<u>Organisational records</u>	
Résumé/brief history of the organisation	
Minutes	One set, preferably signed
Agendas	
Annual accounts	Excluding invoices, cheque stubs etc.
Annual report	
Strategy documents	E.g. business plans
Correspondence	Relating to major projects/events and weeded of ephemera matter*
Funding information, including grants	Applications (preferably only the complete final round application) and decisions
Correspondence relating to charitable registration	For registered charities only
Constitution	
Newsletters	One copy
Questionnaires/user surveys and feedback	Summaries only

<u>Records of premises</u>	
Plans, inventories, fixtures/fittings	

<u>Records of events and activities</u>	
Photographs	Only those with information identifying people, events and places. No packaging. Copyright decision**
Programmes	One copy

Flyers	One copy
Posters	One copy
Event planning documents	Weeded summary file
Press cuttings	If they contain material from sources other than DHC already holds, e.g. from special interest/sector publications
Oral history recordings	With recording agreements and appropriate metadata (contact us for advice before project commences)
Cast/participant lists	
Recording of performance/event	One copy per event, with copyright decision**
Original artwork	Produced at an organisation-led event

* All correspondence files should be examined and items such as circulars, thank you letters, invitations, etc. removed even when the majority of the file is to be retained.

**In order to make effective use of some records, Dorset History Centre must obtain the permission of the copyright holder (author). When depositing artwork, photographic and audiovisual material the organisation must indicate whether it is willing to assign copyright to DHC for the purposes of preservation, public access and promotion.

Records not suitable for permanent preservation

Records	Additional information
Financial records less than 7 years old	Statutory requirement for the organisation to keep these.
Financial records other than summary accounts	i.e. cheque books, receipts, invoices
Insurance documents	
Procedures	
Risk assessments	
Staff files	Including CVs, recruitment and employment details
Personal details of staff/volunteers/members	e.g. names and addresses
Contracts	
Membership books	
Visitor books	
Correspondence of an ephemeral or trivial nature	
Duplicate photographs/programmes/flyers	
Photographs in which people and events can not be identified.	
Circulars from national and regional bodies.	
Material objects such as banners, quilts, lace, tablecloths, etc.	

If you have any queries or would like to discuss a potential deposit, please contact us by telephone: 01305 250550 or by email: archives@dorsetcc.gov.uk