



# 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
- record key events in the business's history or local area
- document the company's ownership of assets
- illustrate 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  
Minutes  
Annual Reports  
Directors' Reports  
Board papers

Business continuity plans  
Company prospectus  
Register of directors  
Register of shareholders  
Trademarks and patent files  
Major project files

Major contracts and agreements  
Business plan  
Business correspondence  
Company structure

### Financial

Journal ledgers  
Day books  
Nominal and Private ledgers

Annual accounts  
External audit reports  
Finance minutes

Balance sheets  
Profit/ loss sheets  
Pre 1920s invoices (if detailed)

### Production

Stock books  
Technical records  
Product manuals

Product files  
Laboratory books  
Pattern books/ sample books

Job files (particularly significant projects)  
Photographs/negatives

## Communications

Press cuttings and articles  
Key media events  
Corporate communications

Speeches  
Promotional brochures

Circulars to shareholders  
Corporate correspondence

## Human resources

Manuals and employee handbooks  
Accident register

Organisational charts  
Performance management

Training manuals and literature

## Staff records

Wages books  
Staff photos  
Staff clubs and societies

Staff magazines and other publications  
Committee minutes

Event photos (eg social, awards, sport)  
Memorials/plaques

## 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/photographs of products/processes

General arrangement/as built plans/final drawings

Sketches (for 'significant' projects)

## Objects

Memorabilia  
Point of sale objects

Trophies/awards/certificates  
Signs

Advertising examples  
Artwork

## NOT to be archived\*

Post 1920s invoices, cheque stubs, bank books, receipts  
Cash books (only retain if top level ledgers are missing)  
Postal books  
petty cash

Publications by trade associations found in libraries  
Other companies' manuals/ advertising  
Shareholding vouchers  
Timetables

Plans and maps held elsewhere  
Quotations  
Tender documents  
Daily timesheets  
Duplicates  
Daily work in progress sheets  
Superseded plans