

How to keep and store the records of your club, society or organisation

If you are responsible for keeping the records of a club, society or organisation, there are a few things you can do to keep them in good order and make it easy for you and others to refer to them – and for you to hand them over either to your successor, or to Gloucestershire Archives if you decide you want us to look after them for you in the long term.

Creating records

Think of the record you are creating, especially minutes of meetings, as being a record not just for you, here and now, but for others in the future who will be interested in what your organisation has been doing. You know who everyone is and where and when your meetings are held, but if you don't record it fully, those who come afterwards won't be able to tell. Please bear this in mind when writing up your records – think of it as writing for someone who doesn't know anything about your organisation.

- Always give the date in full: day, month, year. Year is especially important!
 - you know when you're holding the meeting, but if you don't record the year, it can be very hard to work out the dates of your minutes later
- Always give everyone's names in full: first name, last name – include title if you want, but please include last names
 - you all know who Marjorie, Daphne, John and Clive are, but others won't
- Always give the location of the meeting – if it's someone's house, include the address (at least house name/number and road name)
 - you know where Jenny lives, but "Jenny's house" isn't very helpful to people using the records later
- Explain things that an outsider wouldn't understand or realise – it doesn't have to be in great detail, just enough to give a picture of what's going on.
- If you are hand-writing records, please make sure your writing is clear and easy for someone else to read.

Storing records

For paper records:

- keep the records in a cool, dry place – a spare bedroom is ideal. Keep them away from any source of damp, as damp paper breeds mould which can be hazardous to your health
 - don't use punched plastic pockets, plastic binders or metal paper fasteners as they can worsen damage should damp conditions occur
- keep the organisation's records separately from your own personal records
- if you are involved with more than one organisation, keep their records separately
- keep all signed minutes in a separate file
 - if you need to have copies of minutes, keep them separately

- keep correspondence in chronological order, either by date received or by date of letter
 - either have separate files for in-letters and out-letters, or file corresponding letters together for ease of reference
- keep invoices, bills, bank statements etc in separate files, in chronological order

For further advice on looking after your paper records, see

<http://www.gloucestershire.gov.uk/archives/article/103643/Caring-for-your-own-archive>

For digital records:

- keep the organisation's records separately from your own personal records, in a clearly labelled folder structure, and if you are involved with more than one organisation, keep their records separately in a clearly labelled folder structure
- keep each type of record separately in clearly labelled folders, eg 'Committee Minutes', 'AGM Minutes', 'Correspondence', 'Invoices' etc
- give files clear filenames including dates – remember that slashes / won't be accepted in filenames, but you can format a numerical date in several ways: 01012014, 01 01 2014, 20140101, 2014 01 01 etc
 - it's useful to work out a naming convention so that everyone in the organisation names their files in the same way
 - bear in mind that Windows computers can generally only handle file paths (the filename plus the names of all the folders and subfolders the file is in) of 256 characters or fewer. It may not be possible even to open a file with a longer path – so keep your folder structure simple! For example, this path is 74 characters long:
C:\My Documents\Club Records\Committee Minutes\2014\Minutes 03 12 2014.doc
- if you use a specialist or non-standard piece of software, find out if it's possible to export your work in a format that can be read without the software – for example, XML or PDF
- back up your files! You can back up to a separate computer, an external hard drive, or cloud storage, or a combination of these.

For further advice on looking after your paper records, download our 'Preserving Digital Records' guidelines from <http://www.gloucestershire.gov.uk/archives/deposit>

Preparing records for deposit or donation at Gloucestershire Archives

If you decide to deposit or donate your organisation's records at Gloucestershire Archives, there are a few things you can do to help us make the best of them and interpret them for access by researchers. A deposit is a long-term loan, whereby you retain ownership of the material but we look after it for you. A donation is a gift, whereby you transfer ownership of the material to Gloucestershire Archives.

- you will need to make an appointment with us to bring the material in, to ensure that there will be someone available to meet you. Contact the Collections Management team on 01452 425294 or archives@gloucestershire.gov.uk to book your appointment.
- if possible, please look through the records and remove anything that doesn't need to come to us – this may include the following, but if you're not sure about anything, leave it in and we can make the decision for you:
 - duplicate items – we only need one copy, preferably the original where possible, or if not, the one in best condition; for minutes of meetings, we need the original signed copy wherever possible

- blank letterheads, blank forms, empty or unused folders and books
 - circulars, publications or leaflets from national bodies, government, charities etc, as these will be held nationally in the appropriate archives
 - financial ephemera over 7 years old such as bank statements, bills, invoices, receipts etc – as a rule we only need receipt and payment accounts, and the audited annual accounts where these exist
 - financial records under 7 years old – you need to retain these for audit purposes until they are over 7 years old
- if the material is damp, please try to dry it out if possible before you bring it in – spread it out in a dry space with good air circulation for at least a week
 - if the material is dirty, please gently clean the surface dirt off with a soft-haired brush or a duster before you bring it in, if possible
 - please do not take apart and re-sort the contents of any original bundles or files – the order the material was kept in is very important to us as it can tell us a lot about the documents. This is particularly important for bundles of title deeds, which are usually bundled by property and help us trace the history of individual properties
 - please make a list of the records – we have a template for you to use which makes it easy for us to take your information and put it into our catalogue database. Please contact the Collections Management team on 01452 425294 or archives@gloucestershire.gov.uk and ask us for a copy of the template

For further advice on depositing or donating your archive with us, including retention guidelines for parish and town councils, which cover many of the same types of records as those produced by clubs and societies, as well as our acquisitions service leaflet and our information sheet for donors and depositors, see <http://www.gloucestershire.gov.uk/archives/deposit>