Our archiving workbook

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Work sheets

Our story

About us

Name

What we do

Where we are based

Our history

When we began and who set it up

Why we were set up

Support helping us to get started

Our story

Changes over time

Previous names

Changes of premises

Changes in activity / purpose

Partnerships and support along the way

Our story

Why our story is of value

Reflection space

Our story is of value because:

1.

2.

3.

Our story

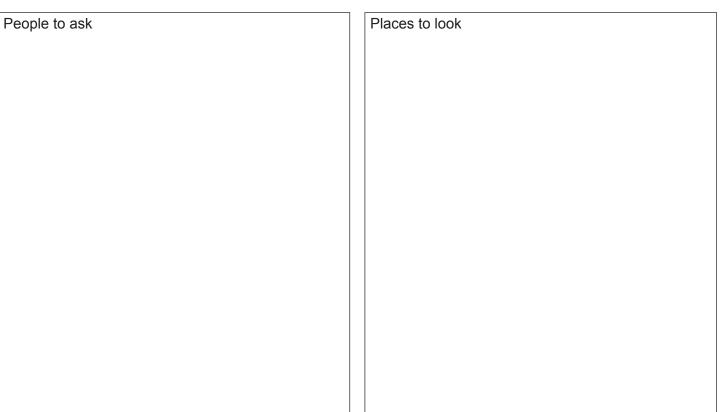## The materials that tell our story

Things/people to consider:

Official	Events	Working groups
Legal	Publications	Steering groups
Financial	Training	Boards
Premises	Marketing	Members
Services	Press / media	Volunteers
Products	Projects	Networks

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Materials for our archive:

Policies	Surveys	Books
Certificates	Project reports	Magazines
Agreements	Press releases	Newsletters
Business plans	News articles	Websites
Annual reports	Adverts	Social media
Accounts	Letters	Presentations
Funding bids	Emails	Training packs
Financial reports	Contact lists	Case studies
Agendas	Invitations	Programmes
Minutes	Event packs	Menus
Meeting papers	Delegate lists	Brochures
Plan drawings	Leaflets	Photographs
Maps	Posters	Videos
Artwork	Branded objects	Recordings

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Our story

Where the materials are held

People to ask	Places to look

Where things are:

Where the materials are held

Keep it safe

Our digital archive

Folder name and location

Locations of backups

Our physical archive

Locations of materials

Location of box lists

Shopping list

Digital

Physical

Keep it safe

Location work plan

	Digital		Physical	
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
18				

Keep it safe

Integrating the archiving process into working practice

1. Have responsible person/s in the organisation been identified to:
- oversee record keeping and archiving?
- transfer material to the archive?

Details

Action required?	No ☐	Yes ☐

2. Is there a plan for how and when different types of material will be transferred to the archive?

Details

Action required?	No ☐	Yes ☐

3. Has this plan been written into a formal document?

Details

Action required?	No ☐	Yes ☐

4. Are all workers such as, paid staff, volunteers, Board members etc, aware of their role and responsibility in the archiving process?

Details

Action required?	No ☐	Yes ☐

Keep it safe

5. Are there processes in place to review:
- how well the archiving plan is working?
- if the archiving plan is being used correctly?

Details
Action required?   No ☐   Yes ☐

Our action plan

Share it

Using our story as an asset

Ways we can use our archive materials for marketing, information, inspiration, celebration and education:

Share it

Our sharing plan

Our historic dates/anniversaries

Upcoming events

Social media days, hashtags, national or world events, commemorative days