

## **Guidelines for Records Transfer to the C. Elizabeth Boyd '33 Archives**

The purpose of these guidelines is to provide specific best practices for managing College records. These guidelines are for paper records and artifacts.

The Archives mission is to preserve the history of Wilson College and its faculty, students, employees, and alumni. Transferring historically valuable records to the Archives ensures that your office is part of Wilson's history.

Your cooperation with these procedures will enable the Archives to preserve and service your office's records more efficiently. If, in any circumstance, you are unsure whether or not an item should be transferred, please contact the College Archivist at [leigh.rupinski@wilson.edu](mailto:leigh.rupinski@wilson.edu) or ext. 2049.

### **What Should I Transfer?**

The Archives wants **inactive records** that document the **purpose and significant functions** of your office or department.

Records are considered inactive when the work to which they relate is no longer ongoing and the records are no longer consulted for routine business. Records are considered inactive when the job they were created to do is finished; they are not needed as an example of a recurring activity; if the process and outcome of the activity the records document are not likely to be referred to/challenged. As a general rule of thumb, if records have not been referred to in 3 years, they are inactive.

Examples:

- Committee records/meeting minutes
- Course records
- Legal records (including contracts)
- Correspondence
- Organizational charts, procedures, or policies
- Photographs of events, people, campus places, etc. (labels preferred)
- Publications - annual reports, directories, financial reports, handbooks, newsletters
- Subject files of the Board of Trustees; chief executive, academic, legal, financial, student affairs, and administrative officers; heads of units, major academic and administrative committees
- Reports: self-studies, accreditation documentation, annual budgets and audits, admissions enrollment reports, fundraising reports, grant proposals and records
- Event publicity (brochures, flyers, programs, etc.)
- Academic, honorary, service, and social organizations of students, faculty, administrators, and staff on campus
- Maps and blueprints of campus and its buildings
- Artifacts/objects related to the institution

*Keep in Mind:* It is important to keep the documentation of a project together. For example, the planning of a new building may take place over many years. Do not pull the first 2 years of the project's files and transfer them while the project is ongoing. Keep all records together until the project is completed and then transfer them as a whole.

Another example: An annual recurring event, such as Reunion. You may only need to keep the most recent 2 years of files to refer to, but all older event files can be transferred annually.

## **What NOT to Transfer**

**Records of routine support activities** (also called housekeeping activities):

- Office supply purchases
- Itineraries, travel reservations, etc.
- Routine requests correspondence or acknowledgements (ex: "Here's a copy of the report you requested"; "thank you")
- Receipts

### **Reference Copies**

Your office may keep documents which were not produced by your office but were distributed throughout the College. These are known as reference copies. We prefer to receive these **only from the office of origin**. Prime examples would be: Wilson magazine (should only come from the Communications Office) or issues of the Billboard.

*Keep in Mind:* This also means that if your office produces documents typically used as reference copies, be sure to send 2 copies to the Archives!

### **External Publications**

Anything NOT created by your department or by Wilson is not collected by the Archives  
Examples:

- Annual reports from foundations
- Brochures from professional groups
- Reprints/photocopies of journal articles

### **Blanks & Duplicates**

Any blank forms, envelopes, stationery, binders, files, office supplies, etc. do not need to be transferred. Similarly, the Archives only save 2-3 copies of any item. Duplicates beyond that number do not need to be transferred.

*Keep in Mind:* Every department's essential and routine functions may look different. If you are unsure whether or not an item should be transferred, please contact the College Archivist at [leigh.rupinski@wilson.edu](mailto:leigh.rupinski@wilson.edu) or ext. 2049.

## **How Often Should I Transfer Records?**

As with most maintenance activities, transferring records on a regular schedule can minimize inconvenience and improve efficiency. We recommend reviewing your office's records annually. Some offices chose to incorporate it as part of end of fiscal year activities.

### **Transfer Process**

1. Identify Records Eligible for Transfer
  - a. Consult with the Archivist as needed to determine what materials should be sent.
  - b. Make sure no active records are being sent.
  - c. Shred or discard any duplicate documents, or documents used as reference copies (not originating from your department)
2. Prepare and pack records
  - a. You may request boxes from the Archives if you do not have any. Please refrain from using plastic totes, tackle boxes, or other non-typical storage boxes.
  - b. Pack records – records should be in non-hanging folders with legible labels that reflect the content of the folders. Obsolete labels should be removed or scratched out. Folders should be packed in the order they were kept by your office.
  - c. Do not over-pack boxes.
  - d. All boxes should be labeled on the outside with the department of origin and number of boxes. Ex: President's Office, Box 1 of 3
3. Complete our Records Transfer Form
  - a. Insert the form in the first box, on top of the contents, under the lid. You may wish to keep a copy of this form for your own reference.
  - b. In addition to this form, you may include a box contents list/inventory that lists all files or items in each box. This may also help you remember what's been sent.
4. Arrange for pick-up or delivery to the Archives
  - a. Contact us so we know to expect your records and can have space available for storage.
  - b. If you wish to deliver the boxes, contact us to arrange a time.
  - c. If you are transferring a large number of boxes, contact Physical Plant to move the items.
  - d. The Archives will notify you when the records arrive.

### **What Happens to the Transferred Records?**

1. When records are transferred to the Archives, they are accessioned. We assign an accession number that uniquely identifies this set of records.
2. We compare the contents of the boxes to the Transfer form you prepared and note discrepancies as needed.
3. We record information about the records, their creators, and their transfer. We make note of any records that need to be kept confidential, and the length of that access restriction.
4. The records will be stored in the secure, climate controlled facility until they are processed. We process the records you transfer based on priority needs. Non-permanent documents are removed (duplicates, reference copies, etc.) while permanent documents will be integrated with other records transferred from your office previously.
5. A finding aid is created to simplify information retrieval. Eventually, this finding aid may also be published in our digital database. Then, information contained in the records can be accessed to answer research requests.
6. Once records are transferred to the Archives, they are not loaned. The information is always available by physically visiting the Archives. If the records have not been processed, access to the information will be limited, which is why it's important that you not transfer records your office still actively needs.