

RECORDS TRANSFER TO THE COLLEGE ARCHIVE PROCEDURES

Inactive records that have been identified as having enduring value must be retained permanently and should be transferred to the College Archives.

When the requirement for retention indicates records should be transferred to the College Archives, departments/offices will need to follow the procedures established by the College Archives to complete the transfer process. *The College Archivist & Records Manager should review and approve all records transfers before records are transferred.*

Determine & Identify Records Eligible for Transfer

- Consult the Records Retention Schedule to make sure the records have passed their retention and are eligible for transfer to the College Archives. The College Archives accepts records listed in the Record Retention Schedule with the disposition instructions that state, “Transfer to the Archive.”
- Contact the College Archivist to coordinate the transfer of records to the College Archives. Records are appraised for their content and enduring value prior to their transfer. The College Archivist may have some specific questions about the records and may ask to see them prior to the transfer.

Records Transfer Form

- Please complete the Records Transfer Form and email the form along with any existing inventory of the records to the College Archivist & Records Manager who will review it and contact you if changes are required or if there are any questions.
- Once the records have been approved for transfer, the College Archivist will email a copy of the Records Transfer Form with the “College Archive Use Only” portion filled out. It is important to note that the Records Transfer Form alerts the College Archivist & Records Manager to impending records transfers. They also document the official transfer of records to the College Archives. Department/Office staff should retain a copy for their files. *Electronic records will require additional information and preparation before transfer.*

Preparing Records for Transfer

Records should be transferred to the College Archives in the original order in which they have been arranged in use, since their organization reflects the functions and activities of the department/office that created the records.

Containers for Transfer

- Materials should be transferred in records boxes. Boxes must have lids and handles. The College Archives will accept records of unusual size, shape, and form; however, it is important to consult with the College Archivist & Records Manager on proper housing of materials to be transferred to the archives in order to ensure that the physical integrity of the records is maintained during transfer.
- Letter-size folders should be packed facing the 12” side of the box and legal-size folders packed facing the 15” side. If you have a mixture of the two folder sizes, pack them facing the 15’ side.
- Records should be packed in boxes with the same folder headings and each folder in the same arrangement as it appeared in the filing drawer or other container. Records may be placed in different file folders than those used for department/office files, but each folder needs to carry the same folder heading as those used in the department/office file.

Inventory

- All transfers to the College Archive should be accompanied by an inventory. The inventory should include folder names per box for the materials to be transferred.
- Submit the inventory as an email attachment along with the completed Records Transfer Form to the College Archivist & Records Manager.

Container Labels

- Label each box to include your department's name, the type(s) of records in each box (including the name and title of the person who produced them), the dates included in the box, the number of each box starting with one, and the date of the transfer. Labels should be placed on one end and one side of each box. A good label might look as follows:

Department: Dean of the College
Type of Record: General Correspondence of Dean Jane Smith
Dates: 1980-1994
Box 1 of 6
Transferred to Archives: 15 February 2018

Transfer to the College Archives

Because the College Archives staff is small, we generally cannot pick up materials from campus departments/offices. Therefore, departments/offices need to coordinate with the College Archivist to arrange the physical transfer of records.