

Johnson Center Philanthropy Archives

A partnership between the Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership (Johnson Center) and Grand Valley State University Libraries at Grand Valley State University (GVSU)

Managing Your Records

How to identify and preserve historical records

What you do is important!

The work you do every day is critically important. You help achieve your organization's goals by delivering services, developing policy positions, distributing information, raising funds, administering programs. As *important as your work is today, it has also implications for tomorrow*. Documenting your organization's goals and activities today will preserve a record that will offer researchers insight into its growth as an organization, its accomplishments, and its vision of the future. For this reason, we developed this brochure to help you identify and preserve your organization's historical records.

How you can help!

CREATE records:

Document the actions, decisions, and conversations that are critical to carrying out your work.

Documenting your activities can greatly enhance the efficiency and effectiveness of your work, and it leaves behind a paper trail for your own administrative use as well as for researchers.

The written word endures.

RESPECT records:

As representations of our work and the people we serve, records deserve respect. Maintaining records in series (filing like materials together), filing records regularly, using appropriate filing supplies, labeling file folders, avoiding overcrowding of filing equipment, storing records off the floor and away from hazards are all techniques to make access to active, records easier and to ensure that records will survive to be preserved.

DESTROY routine records:

Routine records that lose their usefulness quickly can crowd file cabinets and desks. Destroy routine records and duplicates regularly. To speed this process, segregate routine records from records with longer term value, destroy routine records before filing, or file them in a separate file folder adjacent to the folder for related, but more important, records. Destroying routine records and duplicates frees space for active and records with longer term value, making them more accessible.

PRESERVE archival records:

Identify and preserve records you think are important to documenting your work. Such records may have long term usefulness to you as you carry out your activities; they will also form the core of the organizations' archives.

How do you know what to keep and what to destroy?

The following list provides you with general guidelines for managing your records. Routine records that can be destroyed and records that should be preserved are listed. More specific guidelines in the form of a *records schedule* may be created by the organization. Until you receive a schedule for your office, or in the event that a record is not listed on the schedule, use the following list as a guide. Remember that the circumstances from record to record differ and each should be judged on its own merits.

Records that usually have long term value

Administrative records of policy makers
Annual reports (all types)
Audiovisual materials (with well identified subjects and dates)
Biographical files, diaries, journals, vitae, oral histories
Committee/task force/working group files
Consulting and project files
Correspondence and memoranda to or from senior staff
Grant proposals and reports
Minutes and agenda of decision-making bodies
Organizational charts
Photographs and drawings (with well identified subjects and dates)
Planning documents
Policy and procedure manuals
Position papers
Posters, brochures, buttons and other ephemera
Press releases
Program evaluations
Publications of the organization
Public service announcements and advertisements
Reference files about the organization including newspaper clippings (copied on good paper, and filed chronologically).
Reports on major projects
Speeches and testimony
Training materials and manuals

Records that are usually routine with no long term value

Artifacts, objects, and plaques (may be considered for exhibit purposes in limited quantity)
Budget preparation records and other routine financial records, invoices, and receipts
Computer disks
Daily schedules and calendars mailing lists and mail logs
Duplicates (all types)
Forms
Notes and drafts
Payroll vouchers
Personal libraries (will be reviewed by GVSU library)
Personnel records
Phone messages
Publications of other organizations
Reference materials
Routine administrative records
Unsolicited job applications and resumes

The Johnson Center Philanthropy Archives (JCPA) provide researchers with access to a deep and unique scholarly resource of archival materials related to philanthropy and philanthropists in Michigan and support GVSU's commitment to instruction, research, and public service. These materials are historical records of foundations, nonprofit organizations, and individuals and include correspondence, oral histories, photographs, and publications related to the study of philanthropy.

The Archives strive to document the role, functions, and activities of philanthropy and philanthropists:

- within the context of individual philanthropists in Michigan
- within the context of family and public foundations in Michigan
- within the context of the Johnson Center at GVSU
- with respect to current and anticipated research of national or international scope and importance

Whether your records are collected by the JCPA or maintained by yourself or your organization, we encourage you to begin to think about how you and your organization's history will be preserved.

For more information about the Archives and Philanthropy library, visit www.johnsoncenter.org, click on Researchers.