

Summary Guidance for the Royal Geographical Society (with the Institute of British Geographers)
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<http://www.rgs.org/DepartmentArchives>

Selection Criteria: General Advice

Deciding what records ought to be selected for long-term preservation as archives is never easy. There is a huge literature around this subject scattered throughout professional journals. The following brief guidance is essentially a listing of the main dos and don'ts intended to remove some of the subjectivity that inevitably creeps into any archival appraisal process. For more detailed advice or regulations relating to your own institution, you should contact a professionally-qualified archivist. Generally, you should be constantly posing questions of the records in question: do they show adequately what the department has done, why it did it, how it was organised and operated and how it interacted with the parent body and the wider world? The goal is a synoptic view of the department based on hard evidence that will serve legitimate research needs. As a by-product, the physical bulk of material, whether electronic or paper-based, should be greatly reduced.

Subject-Specific Items

It would be helpful if departments (or the appropriate administrative unit) would keep a record of

- number of undergraduates and undergraduate FTE enrolled per year
- number of undergraduate degrees awarded per academic year (by individual degree scheme/class of degree)
- number of postgraduates enrolled each year, and number of postgraduate degrees awarded each academic year
- number of postgraduate staff (incl. research fellows) employed each year
- numbers of academic and non-academic staff (by grade) employed each year

Matters of Archival Policy

Where possible, departments should:

- Respect any original order and context in the physical arrangement of the records as this may well reflect how the department functioned. Well meaning attempts to re-sort or alphabetise material can often destroy key signals that help researchers assess and understand information contained in records.
- Try to think beyond the immediate functional activity or academic discipline reflected in the records. Would the data sustain wider research usage?
- Don't discount more recently-created material.
- Pay particular attention to records dealing with policy formulation, planning and major decisions. Typically these occur in minutes' series but the detail needed to understand the decisions may occur in key administrative files.
- Concentrate on records giving summarised views of what's going on - course handbooks as opposed to course handouts! Course handbooks and similar repeat records series could be sampled every few years if changes are minimal.
- Don't be tempted to destroy evidence of controversial or sensitive issues such as academic disputes or research likely to come under public scrutiny. Sensitivity erodes over time and access can be restricted until that stage is reached.



- Be wary of retaining very bulky research data sets. Consider carefully whether the data in itself is inherently valuable or whether the original project proposal and written results are sufficient. Specialist research data repositories may be more appropriate than local solutions.
- For standard records series such as individual student files, check what is held centrally by the institution which may allow destruction of departmental versions provided the central record provides an adequate summary of what was studied and how it was assessed.
- Retain records documenting significant change or new appointments such as establishment of Chairs. Simple staff directories can also summarise staff 'comings and goings'.
- The vast bulk of transactional finance records can be safely destroyed after recommended local institutional retention periods. Final annual accounts of the department should be sufficient.
- Remember that departmental plans and layouts can provide an overview of main functions and how these change over time, so don't be tempted to destroy anything due to its unwieldy nature.
- Archives are a unique record of past activity, so look for the principal or "golden" copy and get rid of duplication.
- Don't retain records of minor groups whose decisions are reported at higher levels.
- Avoid the 'cherry-picking' approach to archival selection. Context is vital for anyone attempting to understand archives.
- Try to take retention decisions at records series level, e.g., a series of departmental management team minutes, not individual minutes of particular meetings.
- Understand that records dealing with policy, precedent and development are usually more valuable than transactional records that deal with policy implementation. If the transactional records are the only remaining evidence of one of the main functions of the department, they should be retained.
- Be aware that records that have long-term administrative value to the department, such as the terms of an endowment, will have high potential as archives.