



## *In the Vault...*

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*A periodic newsletter about archives and records management in the Town of Burlington.*

### *What should I do with my records/files on Wed. afternoons?*

By now each department has a final record survey report (11 x 17) and we have met to: sign destruction requests; discuss records needed upstairs in the bank building; storage areas needed in the annex; assistance you will need preparing for the move; and survey report questions. The survey report notes if records are permanent or are eligible for destruction after a particular period of time. **A means permanent/longterm value and R means that it can be destroyed within a particular period of time. A records go in blue Hollinger boxes. R records go in white boxes. Never use pen on the boxes, ALWAYS use pencil on the lower-right corner of the short end of the box.**

Today I put location reports in each department's box. This will provide a location key and will describe each series in more detail.

For Wed. afternoons:

- Every department has miscellaneous catalogs, newsletters, old legislation e.g., junk to clean out. I recommend storing 2-3 years of newsletters in 3-ring binders, not in files. This makes them easier to find and reminds you how many years you really have kept. Remember, I would like to start a self-service reference area in the new archives area: this area will have at least one year of *The Beacon* and other state agency publications. This area will also have a self-service copy of the annual report and town meeting records. Annual report and town meeting records will be accessible on the network in the next fiscal year. **Do not keep more than 2-3 years of annual reports,**

**Selectmen minutes or town meeting minutes. We have the originals. Really.**

- The purpose of the records survey report is to tell you how long records need to be retained and/or if they should be transferred to the archives/records center. If you have questions, please ask!
- Duplicates and courtesy copies e.g., material you are cc'ed on can be disposed of without a destruction request.
- Do not destroy original material without checking with me and without a destruction request e.g., letter to Supervisor of Public Records, Mass. State Archives. If you have any questions, please ask!
- For material we discussed transferring to the archives: separate **inactive records** i.e., material that is over 3 years old from **active records** i.e., material that you use regularly in your office. Yes, sometimes active records will be over 3 years old: as long as you actively use it, it is an active record. Separate inactive records into permanent and non-permanent records. This is on your survey report: remember A stands for Archives and R stands for Records: **I have step by step instructions in the transfer instructions. You really do not need records over 3-5 years old in your active records office space. Really. The archives is not a black hole. I have an MLIS and a concentration in archives management. I have moved five times in the last six years. I moved across country by Amtrak and always knew exactly what box the mixing bowls and my diskettes were in. I organize and make records and information accessible for a living. I do not lose things. If**

**something is destroyed, you have to sign off on it first. Trust me.**

- **Box records in series** i.e., like types of records (minutes, annual reports, restaurant licenses, general ledger, project files, correspondence--if you keep it separately--appropriations ledger, etc.)
- Project files for completed projects should be boxed and transferred to the archives.
- Correspondence can be transferred to the archives for sorting.
- **Priorities for transfer:** permanent records such as licenses, minutes, annual reports as well as non-permanent records such as contracts, RFPs, inactive personnel records and civil service records should be transferred first. I will be centralizing the location of contracts and RFPs so that there is just one copy and it is stored in a fireproof vault.

### *How to transfer material/where to get supplies*

Janis has agreed to store a small supply of permanent (blue/A) and non-permanent boxes (white/R) in the supply room in the near future. **On Wednesday afternoons I will leave a supply of white (R) and blue (A) boxes outside the basement vault. I will also leave a supply of transfer forms and transfer instructions on the vault door.** If you need additional copies of the transfer form, I placed a copy at **f:\temp\form01.doc. All documentation will be available at**

**[www.tiac.net/users/lplato/burlmass/move.htm](http://www.tiac.net/users/lplato/burlmass/move.htm) by packing Wednesday in case you lose what I send.** I know it looks like extra paperwork, but it will provide a record of what is where and

will prevent chaos. If you have any questions, please let me know!

### *Timeline*

- 3/30 Send destruction requests to Supervisor of Public Records for records that do not need to be sorted but can be tossed, no questions asked.
- 3/30 Start weekly meetings with departments that require extra, on-site assistance. **Proposed schedule: Mon. Treasurer/Selectmen; Tues. Collector/Clerk; Wed. Engineering/DPW; Fri. Treasurer.** **As for other departments, please know I will be available on an as needed basis: just find me if you have questions. It also means that you are in good shape or it will not take more than a few days to pack your office up!**
- 4/1 Start Wed. moving issues meetings. Larry Rittenberg will send memo confirming time.
- 4/1? Shelving and door installed in bank basement and bank vaults.
- 4/8 Instructions on labeling active records for movers. These are materials you will need up until the last minute and you will not pack them until the last days. After Larry and Melissa determine what furniture is going where, furniture can be labeled for moving.
- 4/8 Start afternoon closing of town hall. Common lunch hour 12-1. Phone procedures will be addressed by each department. Dress-down.
- 4/14? Transfer current vault records to bank basement. Current vault space will be used by Andy Ungerson for reorganizing Building Dept. drawings and as a receiving/check-in/accessioning area for town hall records. Also, Jim will be doing some network stuff in the basement vault.
- 4/18 Targeted records in town hall vault sent out for microfilming.
- 4/24 Finish destroying records from returned destruction requests. Confidentiality of town operations and town employees should not be compromised: personnel records and other confidential records approved

for destruction should be shredded and recycled.

- 6/5? Shelving installed in Conservation, DPW, and Building Dept. record storage areas in annex (all 24" wide?) Individual department are responsible for finalizing space design. I can help with suggestions.
- June 1=target occupancy for bank building (last days packing 5/28-5/29) Mid-June=target occupancy for annex.



### *How to reach Lisa*

Currently the vault does not have a phone line, although there is an email connection. Email [lpato@burlmass.org](mailto:lpato@burlmass.org) or [lpato@tiac.net](mailto:lpato@tiac.net) (the latter address is good if I am not in Burlington). Feel free to leave a phone message with the Town Clerk's Office 270-1660. **During the next few months I will be fairly mobile. Next week I will put an erasable message board on the door: just leave messages questions on the door.**