What is Records Management?

- A system for providing control over records from creation to disposition
- A system for ensuring that records are retained to meet all operational, legal, and intrinsic needs
- It is also what we all do every day as part of our jobs

Permanent Records in the Archives
- Documenting Suffolk’s history and recent legacy
- Making our public programming
- Making our exhibition and classroom Archives
- Making our research
- Helpfully archiving university and administrative information
- Making our records accessible

What is a Records Retention Schedule?
- Provides information on how long to keep records
- Evaluates the usefulness of records
- Synthesizes records
- Simplifies records
- Improves records

Suffolk University Moakley Archive and Institute
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What are records?

A record is an enduring document that contains information that is communicated in multiple forms such as words, images, sounds, or any other medium that allows for the exchange of information.

What are my RIM responsibilities?

The Records Information Management (RIM) responsibilities are:

- Manage and maintain records retention policies and procedures
- Coordinate with other departments on records management
- Provide training on records management to employees
- Ensure compliance with legal and regulatory requirements
- Manage records retention schedules
- Maintain records management systems
- Assist in the development of records management policies and procedures

Permanent Records in the Archives

- Documents not subject to shelf life
- Legal and administrative records
- Research and planning materials
- Historical photographs
- Reference collections
- Legal and administrative records
- Archival and historical materials

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What are records?

- Any written or recorded information that is created, executed, or received by any employee or unit of the University in connection with University business.
- Examples of records include: documents, forms, email messages, electronic files, data and information in computer files or systems, photographs, films, audio recordings, or other documentary materials, and any copies thereof.
- Nonessential records are records such as drafts, duplicates, and convenience copies, are not required to be maintained once their administrative use ceases.

SU Records Retention Policy, 2013
Not all documents are records!

- Extra copies of documents kept only for reference or convenience
- Extra copies of publications kept for distribution purposes
- Faculty research notes or materials developed for classroom use
- Personal or private papers/emails unrelated to University business
- Reference materials such as photocopies of articles used for research or solely for reference
What are my RM responsibilities?

- Create the records necessary to carry out the activities for which you are responsible
- File records in a manner which allows for them to be safely stored and efficiently retrieved when necessary
- Be familiar with Suffolk’s records management policies (on website)
- Manage records in accordance with Suffolk’s records management policies and procedures

Why manage records?

- Control creation and growth of records
- Reduce operations
- Maintain records of the institution’s history
- Meet legal and regulatory requirements
Why manage records?

- Control creation and growth of records
- Reduce operating costs
- Improve efficiency and productivity
- Ensure legal and regulatory compliance
- Safeguard vital information
- Support better decision making
- Preserve corporate memory—We wouldn’t have an Archive without your help!!
The Records Lifecycle

**DISPOSITION**
- Secure, defensible destruction
- Permanent preservation

**CREATION**
- File plans/naming conventions
- Shared storage help
- Supported record types

**STORAGE**
- Inexpensive offsite storage
- Climate controlled, safe, indexed filing
- Long-term preservation
- Efficient retrieval

**USE**
- Maintenance and access
- File plans
- Version control
CREATION

File plans/naming conventions

Shared storage help

Supported record types
USE

Maintenance and access

File plans

Version control
STORAGE

Inexpensive offsite storage

Climate controlled, safe, indexed filing

Long-term preservation

Efficient retrieval
DISPOSITION

Secure, defensible destruction

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The Records Lifecycle

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What is a Records Retention Schedule?

- Provides instruction on how long to keep records (retention) and when they can be destroyed or transferred to the Archives (disposition).

- Ensures that records are kept to fulfill audit, legal and regulatory requirements.

- Empowers you to make thoughtful decisions about retaining and destroying records.

https://wikis.suffolk.edu/display/SUMA/Records+Retention+Schedule
Tips for getting started

- Match your records to the Records Retention Schedule
- Clean out records that are beyond their retention periods
- Only keep on-site those records that you need – use off-site storage for other records
- Send permanent records to the Archives when no longer used in-office
- Maintain your records on an ongoing basis
Permanent Records in the Archives

- Documenting Suffolk's history and corporate legacy
- Exhibits and public programming
- Research assistance and classroom instruction
- Reference services
- Large-scale archiving, scanning, digitization, and destruction projects
- Archival and manuscript collections
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Permanent Records in the Archives
- Documents to Suffolk’s history and dependencies
- Public and legal programming
- Research archives and classroom artifacts
- Reference services
- Legal case studies, club, and extracurricular activity archives and ephemera

What are records?

- A record or records information that is created, collected, or received and preserved by the office or agency in the course of its normal operations. Records are any items of permanent value that are created, received, or maintained by an office or agency in the performance of its duties and functions. Records are any information that is created or collected by the University in the course of its normal operations.

What are my RIM responsibilities?

- The responsibilities include:
  - Develop and maintain records retention policies and procedures
  - Classify records and determine retention
  - Transfer records to the Archives
  - Implement and monitor records management systems
  - Provide training and education on records management

Signs for getting started:

- Create the official Suffolk Records Retention Schedule
- Observe the official Suffolk Records Retention Schedule
- Contact...