





INDIANA HISTORICAL SOCIETY COLLECTIONS ADVISOR

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STARTING AN INSTITUTIONAL ARCHIVE

By Karen DePauw, coordinator, IHS Local History Services

An institutional archive is an important element of any museum, library, or even corporation. Unlike a historical archive that focuses on telling the history of an area, time period, or person based on archival materials, an institutional archive sets out to preserve, collect, and tell the story of the institution that holds the archive. For instance, the historical archive at the Indiana Historical Society tells the story of Indiana through diaries, letters, business papers, et cetera, but the institutional archive tells the story of our institutional history, our founding, publications and programs produced by IHS, plus a myriad of other stories that are primarily important to those working here.

If you do not yet have an institutional archive, whether formal or informal, consider creating an official archive that allows for the easy preservation and organization of things that will help your institution run smoothly for years to come.



[Ayers Building Construction](#) (Bass Photo Co. Collection, Indiana Historical Society)

These are the types of items you might find in an institutional archive:

- financial records
- personnel files
- donor (object and financial) records
- final publications



ONLINE RESOURCES

[Exempt Organization Public Disclosure and Availability Requirements](#)
(International Revenue Service)

[Starting from Scratch: How to Create a Museum Archives](#)
(Sammie L. Morris, Purdue University, Purdue e-Pubs.)

[Museum Archives Guidelines](#)
(Society of American Archivists)

[Scope of Institutional Archives Collections](#)
(The Getty Research Institute)

FROM OUR LENDING RESOURCE CENTER

[Using, Managing, and Preserving the Records of Your Historical Organization](#)
(James Summerville)

[Managing Archives for Small Businesses](#)
(Neil Dahlstrom)

[Developing and Maintaining Practical Archives](#)
(Gregory S. Hunter)

UPCOMING TRAINING AND PROGRAMS

[Concepts of AV](#)

- marketing materials
- exhibit label copy
- building floor plans and blueprints
- policies
- procedures
- meeting minutes
- important correspondence
- programming information
- contracts from collaborative projects
- press and media coverage
- oral histories of past staff, board, trustees and volunteers

[Preservation](#)
August 7 -
 Northeast Document
 Conservation Center.

[Fundraising for Local
 History: Fundraising
 Basics and Making Your
 Case for Support](#)
August 10; 17 -
 Indiana Historical
 Society.



[Advertising Agency Meeting Room](#) (Indiana Historical Society)

HOW TO START AN INSTITUTIONAL ARCHIVE

A great place to start is with a collections policy. If you already have one for your historical collection then you might just need to add a special section that addresses the institutional archive. A better course of action might be to create an entire collections management policy for the institutional archive alone. Even a brief policy that addresses the what, how, and why we collect and also the question of access would serve as a great first step. Below are some questions to ask in order to get started with setting up the policy and the archive.

- Who should be at the table to write the policy and make decisions about the policy and process of gathering things into the archive? Whether made up of volunteers or paid staff, it is important to include representatives from each department or committee that might create items relevant to the archive (exhibits committee, marketing department, donor relations, et cetera). This group should also include a board representative as the board creates a number of records that should be captured in an institutional archive.
- What will be included in the archive? Start by making a list of all the types of records created by the institution and then discuss which of these records are suitable for the institutional archive. Perhaps a new exhibit results in label drafts, exhibit mock-ups, final label text, opening night invitations, press releases, loan paperwork and grant documents. The drafts, mock ups and more than one copy of the press release may not make sense for the institutional archive but the other items that really get to the heart of the exhibit are.
- How many copies of each item should there be (i.e.: one of each major publication but maybe three or four copies of smaller marketing pieces that are more susceptible to damage, loss, or deterioration)? Consider if you would like one copy of certain materials for "preservation" purposes and a second copy for research access.
- When and how will items physically come into the archive? Create a process that lets each

department or committee know who to give the items to and when. For instance, some institutions might find it best for things to trickle in throughout the year, others may want to set up a time at the beginning of each new fiscal year where every department/committee is expected to do a sweep and take any necessary items to the archives at the same time.



[Judge Henry J. Richardson, Jr. in the Courtroom](#) (Indianapolis Recorder Collection, Indiana Historical Society)

- Are there any legal restrictions on information in the archive? Are there any restrictions placed by the institution on the records (restrictions that abide by the legalities regarding access to non-profit records)?
- How will records in the archive be physically organized? By year? By type? By department? Does year versus type change depending on the department and how the items are generally used? For instance, it might make more sense for financial records to be kept by year but marketing records to be kept together by type.
- What records of the institution are considered "current" and which are "noncurrent?" Current records are generally used frequently enough by staff that they warrant being housed outside of the archive in a space that makes sense, such as someone's office. There should be plans in place for how current records are transferred to the archive when they are no longer used on a regular basis. Noncurrent records are those used only occasionally by staff and are generally older. Some organizations set general guidelines for making the current versus noncurrent designation and then shift those on a case-by-case basis when necessary. For instance, it might be deemed that after three years most records are considered noncurrent and those appropriate for the archive are moved there, while other records, such as accession records for a museum collection, may constantly be considered current and permanently remain in the collections office.
- Who is charged with cataloguing and making the items accessible? Will this person have open hours for accessibility of the archive, or will multiple people be trained in how to properly access the archives so they are available at all times?
- Where will the archive be physically stored and who will have access.

Remember, beginning an institutional archive is an activity that should be shared across the institution. Although one person may be in charge of caring for and providing access to the archive, it contains the records and history of an entire organization. Make sure those who need a say have one and those who need access are granted it.

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