

How to Clean Out a Union Office Without Destroying History

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PART ONE: "SETTING UP A RECORDS SYSTEM"

The following considerations will be useful as you begin the process of preserving the history of your local union or related organization.

- 1. Take the time to plan for managing your administrative records.** You, or your successors, will be glad you did. Remember that records management applies to all formats (paper documents/photographs/audio recordings/video tapes/film/digital files).
- 2. Set up filing and document management systems. Why?**
 - a. They offer a quick and easy way to place and retrieve information
 - b. It assures continuity and consistency of record-keeping
 - c. It allows for easy identification of inactive records
- 3. Stick to the filing systems you create.**
 - a. Use and adapt existing schedules from your union's regional or national office, if possible. Don't reinvent the wheel if you can avoid doing so.
 - b. Weed and purge records based on pre-set schedules.
 - c. Maintain consistent filing schemes. File by:
 - i. Subject
 - ii. Date
 - iii. Numerical code
 - d. Keep non-current records separate from active records.
 - e. Keep non-current records in a secure, accessible, and non-destructive physical environment.
- 4. Remember that electronic documents are also records.**
 - a. Electronic file structures should mimic paper files whenever possible.
 - b. Set up networks, folders, and electronic files based on your administrative structure.
 - c. Adopt a common set of naming conventions for files and stick to them.

- d. Create a plan to purge, archive, and/or destroy your electronic records.
- e. Accept that, in the absence of a really good network management system, it is still easier, and safer, to print the documents you need to keep.
- f. Just because it's digital, that doesn't mean it's forever. Make sure your electronic records are backed-up regularly. Keep the backed-up data physically and digitally separate.

5. Avoid these common hazards.

- a. Older records tend to overpower newer records. Therefore you need to transfer files to inactive storage regularly. Otherwise your filing systems and filing cabinets will get clogged.
- b. In records management, creativity is not necessarily a good thing. It's better to develop and maintain a standard filing order.
- c. Get comfortable with the idea that you have to destroy some records in order to save your history. Use records schedules to regularly destroy inactive records.
- d. Don't keep records just to keep records. Your union's records should be kept to satisfy specific needs. These include:
 - i. Administrative need
 - ii. Legal requirements
 - iii. Documenting financial transactions
 - iv. Preserving your history

PART TWO: "CLEANING OUT RECORDS"

The following points will be helpful in the process of making decisions about disposal of the records of a union local or related organization.

1. Inform yourself about the history of the local/office. Make sure you know where, and in whose footsteps, you tread.

- a. Read what is in print or on the Internet
- b. Familiarize yourself with the union publications, newsletters, annual reports, contract history.
- c. Speak with whomever you can about its history- both current members and retirees.

2. Find out about the past practice, the guidelines, and the records of management policies.

- a. What practices have been used before?
- b. Are there records schedules already in place?
- c. Have records ever been donated to an archives or library?
- d. Have records been destroyed or transferred to a higher (regional/national) office?

3. Decide on your goals and develop a plan of action based on these.

- a. Ongoing records management work.
- b. Changing over to a new record-keeping system.

- c. Cleaning out a closed office.

4. Call in experts as needed.

- a. Records managers from the union's national/regional office.
- b. Contract records managers.
- c. Archivists or librarians.

5. Document your work. Sooner or later someone will need to know what you did. Keep a record of your decisions and actions. Make sure this accompanies records that are transferred or donated.

6. Stop and make history by creating documentation as you proceed

Cleaning may be best opportunity you have to assist in creating badly-needed historical documentation.

- a. Compiling oral histories
- b. Photographing/videotaping offices/members/work areas

7. Adjust your work plan based on what you discover.

Records can be found in the oddest places.

8. Weigh your options.

- a. Donation to an archives/library/historical society.
- b. Transfer of records to another local/union.
- c. Reformatting records through microfilming or digitization.
- d. Physical destruction of records.
- e. Some mix of all of the above.

9. Guidelines for doing the actual work.

- a. Follow any existing records schedules.
- b. Spend the time to develop an understanding of the filing systems.
- c. Examine electronic files as well as paper documents.
- d. Make sure you evaluate all other non-paper formats (audio, video, film, photographs)
- e. Follow past practice for records transfers.
- f. Ensure that records destruction follows union guidelines/practices for security and personal identification.
- g. Ensure you are complying with the necessary state and federal laws for keeping records.

10. Choose Carefully if you decide to donate to an archival repository. Be prepared to help offset the costs of storage, preservation, and processing through a donation, an in-kind labor donation, or both. The Labor Archives of Washington State was created specifically to collection, arrange, describe, and make accessible the historical records of the labor movement in the Pacific Northwest.