



## SAFEGUARDING THE PAST: PLANNING A COMPANY ARCHIVES

Reprinted from the Fall 2011 edition

Developing an archival program can be a daunting task—especially when the concept of “archives” is often equated with “storing old files.” However, in an era of information overload and employee turnover, companies can have a distinct competitive advantage if they efficiently maintain institutional knowledge in an archives.

### Why have a corporate archives?

A functioning corporate archives can be a valuable resource for managers, product developers, marketing staff in-house counsel, and PR professionals. Materials documenting the business and policies of the corporation are easily located, allowing future managers and staff to capitalize on lessons learned and to envision how it might go forward. Important assets are preserved, such as product samples and design documents. Legal documents are systematically retained and made accessible only to those who are authorized to review them. Many corporations, such as Levi Strauss, Coca-Cola, and Disney, use their history as a marketing and PR tool.

### Generate company buy-in

Corporate archival projects will not succeed without a project champion and strong support within the organization. As you promote your project within the organization, you may find that other staff members are interested in starting an archives or have already taken steps to do so. Gathering consensus will help build momentum.

### Start with clear objectives

Set specific goals for the archives. Successful archival programs are aligned with a company's business objectives, not storage needs. Determine what will be maintained and why. Aside from legal or regulatory compliance needs, each company has its own mission. How will the company archives serve to support this mission?

In general, what the company “does” should be documented in the archives. For example, a manufacturing company should retain product and packaging samples,

design materials, and product marketing brochures. The archives should document the organization's management, workers, unions, and customers by collecting management directives and correspondence, strategic plans, position descriptions, salary scales, payroll records, union Memoranda of Understanding (MOU), employee newsletters, event images, oral histories, and records documenting interactions with customers. Artifacts, such as samples of employee awards, party favors, and promotional items, have historical value and should be preserved in an archives.

Once you have sketched out your goals and objectives, create a clear, focused collection policy for determining what to keep and—just as important—what not to keep. If you have a records management program, coordinate your archival plans with this program to insure that you identify and retain records of enduring value in the archives.

Most companies instinctively save documents that might have historical value or legal importance, but without guidelines the tendency can be to save everything. One of the first big challenges of implementing a program will be to review the backlog of material already “archived” and weed out items that can safely be discarded. According to the Society of American Archivists, most business archives should be comprised of less than 3 percent of all company records.<sup>1</sup>

### Address logistical issues

However the archives is constituted, there are some practical considerations for maintenance:

- Where will you store the archives?  
Archival materials should be stored in a climate-controlled space using acid-free storage materials and equipment, with security against fire, water damage, etc.
- How will you control and manage access to the archives?  
Be sure to set up and enforce policies and procedures for the retrieval, use, and access to records. Who should have access to the

collection (whole or in part) and how you will manage access? What finding aids will be available and how will they be accessed?

- How will you keep your program going?  
A corporate archives program can often build upon the framework of an effective records management program. If your corporation does not have a records management program in place, consider creating both so that you have an integrated plan for systematically preserving and disposing of documents moving forward.

In our experience, many corporate archives are achieved as a result of a multi-step process. Consider reaching out to professionals who can help. Professional archivists can help you think through a collection policy, prioritize tasks, and advise you how to allocate resources more efficiently. At History Associates, our archivists can help, whether you need an independent assessment to support a business case or hands-on assistance in implementing your plan.

*For more information, contact archivist/records manager Abigail L. Dixon, C.A. She works on a variety of archives and records management projects for History Associates' office in Brea, California. Contact her at (714) 529-3953 or e-mail at [adixon@historyassociates.com](mailto:adixon@historyassociates.com).*

### Other Recommended Resources

Society of American Archivists  
([www.archivists.org](http://www.archivists.org))

Academy of Certified Archivists  
([www.certifiedarchivists.org](http://www.certifiedarchivists.org))

ARMA International  
([www.arma.org](http://www.arma.org))

Council of State Archivists  
([www.statearchivists.org/connections/archivalassns.htm](http://www.statearchivists.org/connections/archivalassns.htm))

<sup>1</sup> Society of American Archivists (SAA). (n.d.). “Business Archives in North America: Invest in Your Future, Understand Your Past.” Retrieved August 4, 2011 from SAA website: [www.archivists.org/saagroups/bas/busArchives%202.asp](http://www.archivists.org/saagroups/bas/busArchives%202.asp).