

Transfer of Institutional Archival Records FAQs

1. What are institutional archival records?

Documents or other materials created or received by the *Peabody Essex Museum*, or its predecessors, the *Essex Institute* or the *Peabody Museum of Salem*, in the course of daily operations, from all areas of activity that have been selected for permanent preservation because of their enduring historical value.¹ These records include but are not limited to:

- Minutes and papers of the Board of Trustees
- Minutes and papers of other significant committees
- Marketing material
- Annual reports
- Financial accounts
- Corporate and business plans
- Exhibition case files
- Building records and plans
- Research subject files, including correspondence and research notes
- Visitor reports/surveys
- Object files, including acquisition and conservation records*
- Accession registers*
- Loan registers*

See the records retention policy for specific examples of institutional records.

*These are collection management records, which belong in the Collection Documentation Center. Contact [REDACTED] if you have materials that belong in the CDC.

2. Where is the Institutional Archive?

The Institutional Archive, or Archive, is located at the Phillips Library.

3. Who has access to the institutional records?

Like any of the library's manuscripts or rare materials, staff may view the institutional archives in the reading room at the Collections Center. The *PEM* records are not available to the public; however, public researchers may view the *Essex Institute* or *Peabody Museum of Salem's* records. Some materials are restricted or confidential due to their content. Restriction guidelines are always observed, which means that materials may not be available to staff, or only available to certain staff.

¹ Brunskill, Charlotte and Demb, Sarah R. *Records Management for Museums and Galleries: An Introduction*. Oxford: Chandos Publishing, 2012.

4. How long do you keep records at the Archive?

All records sent to the Archive are kept permanently; because of this, space is limited, which is why it is important that items sent here have enduring value.

5. How do I send stuff to the Archive?

Once records no longer need to be accessed on a regular basis, and have been classified as “permanent” according to the records retention guidelines, you may pack up the records. Please keep them in order, if there is an order.

Next, fill out a Transfer of Institutional Records form for each carton. After this has been done, contact the Manuscript Librarian to notify them that you are sending boxes to the Archive. Materials may be sent to the Library through inter-office mail.

6. How do I pack the materials?

All records need to be packed in record cartons aka bankers’ boxes. They can be ordered through Staples. It is best that you use these boxes, as they will fit on the shelves, and are easy to carry. Please do not send items in a box smaller than this, or without a box. Items that are too big for a record carton need to be packed in larger boxes, or wrapped in packing paper for transfer to the Library to protect them.

7. Why do I need to do so much paperwork?

By sending these records to the Institutional Archive, you are indicating that these records are important, for legal or historical reasons, and should be kept *forever*; however, some information may be private or confidential, and have restrictions placed on it. In order for these records to maintain their context (what they are and why they are important), and for any restrictions to be respected, certain information must remain with the records.

Providing this information with the records you are sending allows us to: find the records in the future for staff use and audits; know if a box contains information that is confidential or should be restricted for a certain time; take preservation measures for electronic media so that the information contained on them can be accessible in the future; ensure that the materials are appropriate for the Archive.