Policy and Governance Department

June 13, 2022

Records and Archives Management Update

Background

In April 2022, the DSU Policy and Governance Department hired a student to work part-time over the summer term in the role of Records and Archives Manager. The Records and Archives Manager is directly supervised by the Policy and Governance Coordinator and has been tasked with optimizing record-keeping practices at the DSU. Through updating existing systems, working with staff to develop or improve document storage plans, and organizing both digital and physical files, the Records and Archives Manager will play a key role in preserving the DSU’s history, present, and future.

Job Description

The Records and Archives Manager will:

- Assess the DSU’s current record-keeping and archival management systems in order to recommend and implement improvements
- Organize, scan, index, and classify active and inactive paper and electronic documents and data, including policies, reports, minutes, agendas, templates, and more
- In accordance with industry standards and best practices, create and implement plans for the ongoing management and storage of both physical and digital DSU files, including a specific plan for the Record Storage Room and the Digital Archives
- Train current staff and executives in the use of all records management systems and create resources for future training
- Ensure that records management practices comply with the DSU bylaws and policies, in particular the Records and Archives Policy
Progress May – June

The first main task undertaken by the R&A Manager was to evaluate the DSU’s current archival management systems in order to make a recommendation as to whether the Union should create and maintain a private archive or utilize the existing Dalhousie Library Archives.

Based on costs and labor, it is their recommendation that the DSU keep all records for a 2-7 year period after their creation (depending on record type) and following their existence at the DSU, conduct regular donations to the Dal Archives.

Their proposed plan of action is as follows:

- Cleaning out of current records storage.
- Grouping of files according to those being kept in the building, those donated and those to be disposed of.
- Immediate update of organizational process going forward. Files of the current year should be kept in the offices of their respective creators if possible, or in filing cabinets in a central location.
- Relationship established with Dalhousie University Archives.

The cleaning out of current records storage and grouping of physical files has been underway since mid-May and is on track to conclude by mid-July. The R&A Manager is working with a team of volunteers to complete this element of the project. Updates to the organizational process for both physical and digital files have been completed and circulated to DSU executives and staff.

The R&A Manager gave a presentation to the Executive Committee on May 11th to review the pros and cons of both archival management options and discuss their final recommendation. At that time, the Executive Committee gave their approval to begin the process of developing a relationship with the Dal Archives.

Next Steps and Timeline

The process of donating DSU archival material to the Dal Archives involves several steps. Following the R&A Manager’s work to organize the material, it will be sent to the Dal Archives to conduct an appraisal. During the appraisal they will review the Union’s material in order to identify materials that have sufficient (i.e., permanent) value to be accessioned. Accession means to take legal and physical custody of a group of records or other materials and to formally document their receipt.

This involves the DSU entering into a legal agreement with the Dal Archives, called a deed of gift. The deed of gift is currently being drafted. Once a draft is complete, the DSU will engage legal counsel to review the agreement. Then the Executive Committee will bring a motion to DSU Council to approve the Executive Committee’s signing of the agreement. This motion will hopefully be brought to Council in August.