

Records Management at The Baltimore Museum of Art

Anna Clarkson, Project Archivist



BMA Overview



- 1914 – Baltimore Museum of Art established
- 1999 – Library Director added a physical archives space and focus onto the Archives
- 2000 – Basement emptied
- 2000 – Library staff member designated as BMA Archivist
- 2010 – Applied for NHPRC Start-Up Grant
- 2011 – Awarded NHPRC Grant
- 2012 – Records Retention Schedule completed

Impact on Institution



- Time and Cost Savings
- Legally compliant
- Minimized litigation risks
- New Policies protect staff and institution
- Vital and important information protected
- Increased understanding of BMA records & how they relate to each other
- Increased levels of respect and mutual understanding between staff

Cooperation with Records Creators

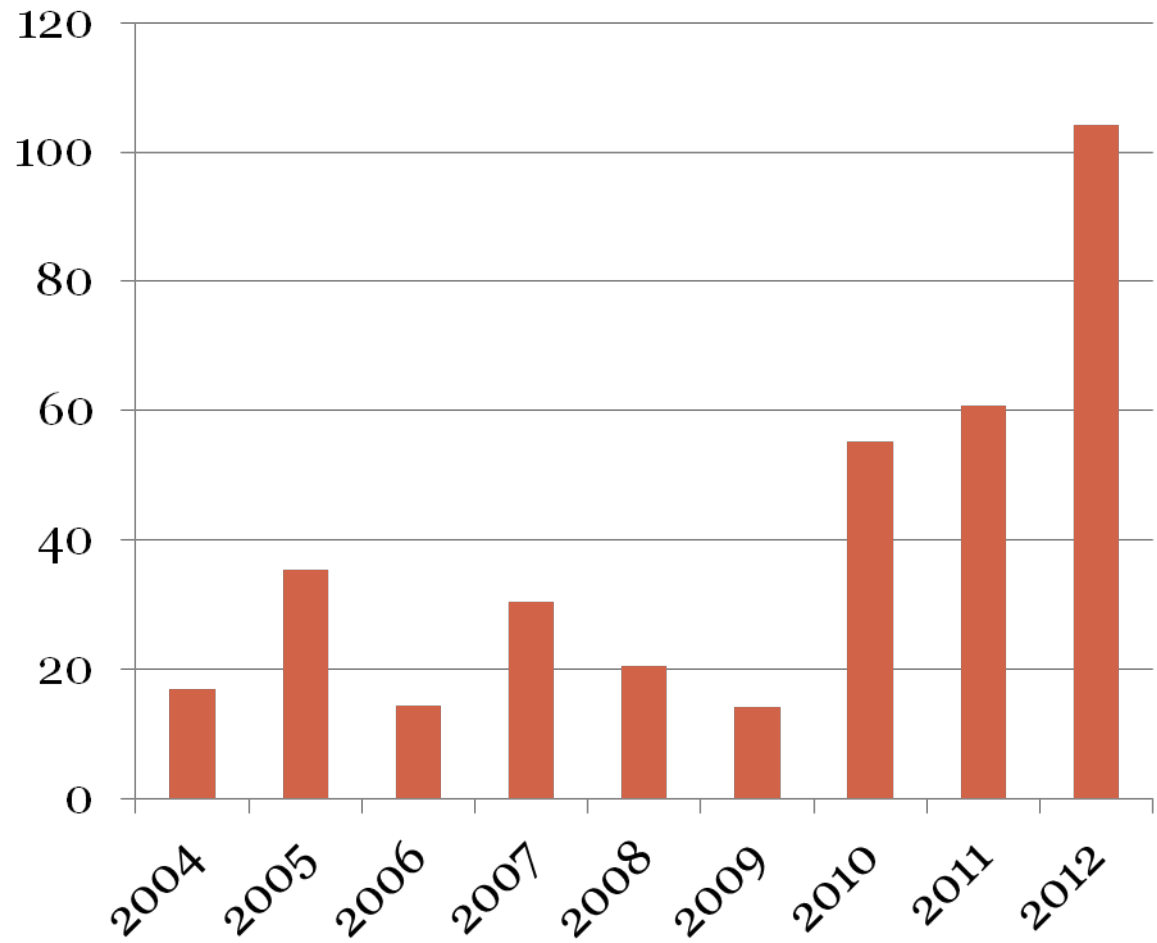


- **Records creators know ...**
 - What to keep and for how long
 - What to weed before sending materials to the Archives
 - Records are being cared for
 - Records can be easily located & retrieved
 - Archives provides public access when appropriate
 - Confidential records will be kept closed



BMA Records Transferred to the Archives

Paper Records in Linear Feet per Year



Archives: A work in progress



Records Management System



- Developed free, open source, password-protected *WordPress* website to display records retention schedules, policies, and procedures
 - Allows staff to change and update information in real time
 - Reduces Museum's paper footprint
 - Easily searchable
 - Open-source software is widely supported and allows information to be freely imported and exported
- Customized existing free, open source software, *Archivists' Toolkit*, to track records sent to the Records Center and their ultimate destruction
 - No additional software required
 - No maintenance fees
 - Searchable
 - Can print destruction reports

Web Page: Home Page



The screenshot shows a web browser window displaying the home page of the BMA Records Management website. The browser's address bar shows the URL <http://www.bmalibrary.org/>. The page features a navigation menu with links to HOME, RETENTION SCHEDULES, POLICIES, PROCEDURES, GUIDELINES, FORMS, ABOUT, and QUESTIONS ?. Below the menu is a large image of a storage rack filled with boxes, with a box labeled '2015' in the foreground. At the bottom of the page, there is a search bar and a 'Search' button. The browser's status bar at the bottom indicates 'Slide 1 of 22', 'Civic', and the date and time '11:19 AM 3/13/2013'.

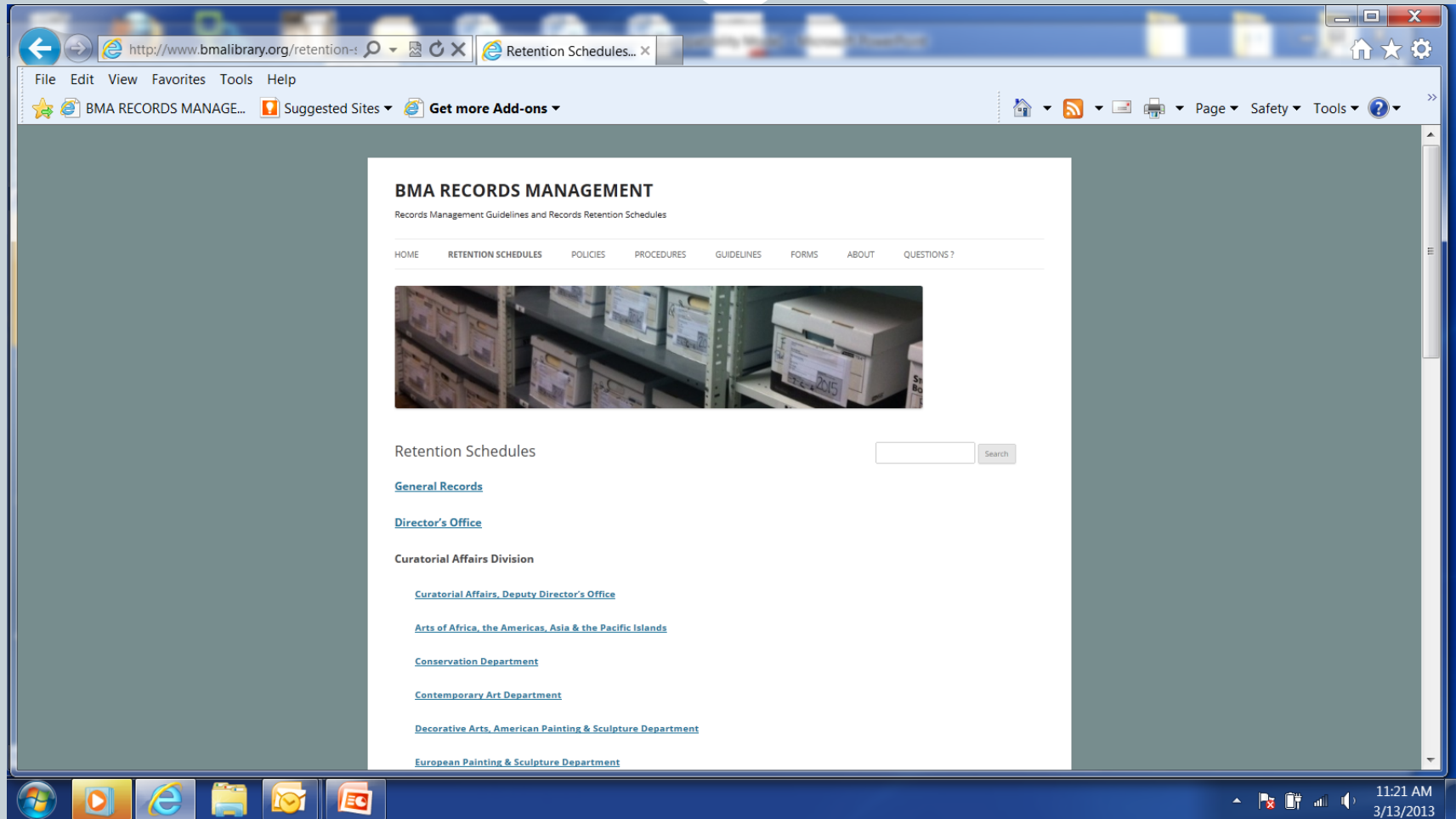
BMA RECORDS MANAGEMENT
Records Management Guidelines and Records Retention Schedules

[HOME](#) [RETENTION SCHEDULES](#) [POLICIES](#) [PROCEDURES](#) [GUIDELINES](#) [FORMS](#) [ABOUT](#) [QUESTIONS ?](#)

Home

Search

Web Page: Records Retention Schedules



Web Page: Example of RRS



Conservation Department Records Retention Schedule

A = Active / FY = Fiscal Year / P = Permanent / PL = Permanently Retain in Office of Origin

Show entries

Search:

RECORD NAME	RECORD DESCRIPTION	RETAIN IN OFFICE	RETAIN IN RECORDS CENTER	TRANSFER TO ARCHIVES	TOTAL RETENTION	COMMENTS / LEGAL CITATIONS
Collections Files	Files on specific collections of artwork within the BMA including the Peabody Collection (on loan), The Cone Collection, etc...	PL	no	no	PL	
Collections Maintenance	Correspondence with BMA staff related to the maintenance of the collection such as vacuuming and dusting.	A + 3 yrs	no	no	A + 3 yrs	File significant "Collections Maintenance" records in Collections Files for permanent retention.
Deaccessions	Conservation files of deaccessioned objects.	PL	no	no	PL	

9:26 AM 3/14/2013

Archives vs. Records Center Workflow



Archives

- Create accession record in Archives section of Archivists' Toolkit
- Put the material in line for processing

Records Center

- Create accession record in Records Center of Archivists' Toolkit
- Assign the appropriate destruction date and a location in the RC
- Physically move the box to the RC

Archives Accession Record

Archives Accession Record

Record 11 of 310

Title: Prints, Drawings & Photographs Department Records Accession #: 2013.05.01

Basic Information Accession Notes User defined fields Names & Subjects Acknowledgements, Restrictions & Processing Tasks

Accession Number 2013 05 01

Accession Date 2/12/2013

Resources Linked to this accession

Resource Identifier	Resource Title
BMA.17	Prints, Drawings and Photographs D...

Link Resource Remove Link

Resource Type Records

Title Prints, Drawings & Photographs Department Records

Extent

Extent Number 0.04 Linear feet

Container Summary (2 items)

Repository BMA Archives Change Repository

Date Expression Circa 1988

Date

Begin 1986 End 1990

Bulk Dates

Begin End

Deaccessions

Deaccession Date	Extent	Extent Measurement
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Add Deaccession Remove Deaccession

Locations

Location	Note
Museum - 3rd - Vertical File Room - ...	

Add Location Remove Location

General Accession Note

Transferred from PDP Department by Ben Levy. 11/2012. EER

First Previous Next Last Reports Close Save

Created: Feb 12, 2013 by emily | Modified: Feb 15, 2013 by emily | Record Number: 311

Records Center Accession Record

Accessions Record 25 of 310

Title: Payroll Records (FY12 Payroll Reports July 1, 2011 to July 27, 2012) Accession #: RC.2013.09

Basic Information | Accession Notes | User defined fields | Names & Subjects | Acknowledgements, Restrictions & Processing Tasks

Accession Number RC 2013 09 Date Expression 2011 July 1 - 2012 July 27

Accession Date 1/2/2013 Date
Begin 2011 End 2012

Resources Linked to this accession

Resource Identifier	Resource Title
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Link Resource Remove Link

Resource Type Temporary Records Bulk Dates
Begin End

Title
Payroll Records (FY12 Payroll Reports July 1, 2011 to July 27, 2012)

Extent

Extent Number 1.25 Linear feet

Container Summary
1 box

Deaccessions

Deaccession Date	Extent	Extent Measurement
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Add Deaccession Remove Deaccession

Locations

Location	Note
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Add Location Remove Location

General Accession Note
Transfer received December 20, 2012 by Anna Clarkson.

Repository BMA Archives Change Repository

First Previous Next Last Reports Close Save

Created: Jan 2, 2013 by anna | Modified: Feb 13, 2013 by anna | Record Number: 295

Accessions

Record 25 of 310

Title: Payroll Records (FY12 Payroll Reports July 1, 2011 to July 27, 2012)

Accession #: RC.2013.09

Basic Information

Accession Notes

User defined fields

Names & Subjects

Acknowledgements, Restrictions & Processing Tasks

Acquisition Type

Transfer to Records Center

Retention Rule

Destroy 2019

Inventory

Disposition Note

Description

One box of Payroll records consisting of FY12 Payroll Reports.

Condition

External Documents

Table with 4 columns: HREF, Type, Title, Content

Buttons: Add Document, Remove Document, Open in Browser

Navigation: First, Previous, Next, Last, Reports, Close, Save

Footer: Created: Jan 2, 2013 by anna | Modified: Feb 13, 2013 by anna | Record Number: 295

Accessions

Record 25 of 310

Title: Payroll Records (FY12 Payroll Reports July 1, 2011 to July 27, 2012)

Accession #: RC.2013.09

Basic Information | Accession Notes | User defined fields | **Names & Subjects** | Acknowledgements, Restrictions & Processing Tasks

Names

Name	Name Link Function	Name Link Creator / Subject Role
Arrington, Sophia	Source	
Baltimore Museum of Art	Creator	
Nieberlein, Wade	Source	

Edit Name Link

Add Name Link

Remove Name Link

Subjects

Subject

Add Subject Link

Remove Subject Link



First



Previous



Next



Last



Reports



Close



Save

Created: Jan 2, 2013 by anna | Modified: Feb 13, 2013 by anna | Record Number: 295

ARLIS



Search Desktop



10:45 AM

Sorting by Destruction Date

Archivists' Toolkit - 2.0.0 - update 13

File Import Setup Reports Tools Help

Search List All New Record Reports Delete Filter search results

Names
Subjects
Accessions
Resources
Digital Objects

Accessions

310 Record(s) found for search "list all"

Accession Number	Title	Accession Date	Description	Retention Rule	Extent Number	Extent Measurement
RC.2013.16	Sign-In Sheets	1/2/2013	Contains one box of Sign-In Sheets	Destroy 2031	1.25	Linear feet
RC.2013.14	Sign-In Sheets	1/2/2012	1 box of Sign-In Sheets	Destroy 2023	1.25	Linear feet
RC.2013.09	Payroll Records (...)	1/2/2013	One box of Payroll Records	Destroy 2019	1.25	Linear feet
RC.2013.001	Payroll (Benefit ...)	1/2/2013	Payroll records (...)	Destroy 2018	1.25	Linear feet
RC.2013.06	Payroll (FY11 Pa...)	1/2/2013	Contains on box of Payroll (FY11 Pa...)	Destroy 2018	1.25	Linear feet
RC.2013.07	Payroll (FY11 Ti...)	1/2/2013	2 boxes of Payroll (FY11 Ti...)	Destroy 2018	2.25	Linear feet
RC.2012.003	Cash Receipts	11/6/2012	Cash receipts for...	Destroy 2018	3.75	Linear feet
RC.2012.006	Journal Entries	11/6/2012	Journal entries f...	Destroy 2018	2.25	Linear feet
RC.2012.017	Cash Receipts a...	11/8/2012	Development ca...	Destroy 2018	1.25	Linear feet
RC.2012.002	Vendor Files / A...	11/6/2012	Paid vendor file...	Destroy 2018	10	Linear feet
RC.2013.002	Payroll (Payroll R...)	1/2/2013	Payroll records f...	Destroy 2017	1.25	Linear feet
RC.2013.004	Payroll (FY11 Ti...)	1/2/2013	2 boxes of Payro...	Destroy 2017	2.25	Linear feet
RC.2013.08	Payroll (FY10 Ti...)	1/2/2013	Two boxes of Pa...	Destroy 2017	2.25	Linear feet
RC.2013.018	Package Pick-up...	1/2/2012	Contains multipl...	Destroy 2017	1.25	Linear feet
RC.2012.004	Cash Receipts	11/6/2012	Cash receipts fr...	Destroy 2017	3.75	Linear feet
RC.2012.005	Journal Entries	11/6/2012	Journal entrie...	Destroy 2017	1.25	Linear feet
RC.2012.016	Cash Receipts a...	11/8/2012	Development ca...	Destroy 2017	1.25	Linear feet
RC.2012.001	Vendor Files / A...	11/6/2012	Paid vendor file...	Destroy 2017	10	Linear feet
RC.2013.005	Payroll (FY09 Ti...)	1/2/2013	1 box of Payroll ...	Destroy 2016	1.25	Linear feet
RC.2013.20	Employee Files (...)	3/1/2013	Employee Files (...)	Destroy 2016	1.25	Linear feet
RC.2013.21	Employee Files (...)	3/1/2013	Employee Files (...)	Destroy 2016	1.25	Linear feet
RC.2013.22	Employee Files (...)	3/4/2013	Employee Files (...)	Destroy 2016	1.25	Linear feet
RC.2013.25	Employee Files (...)	3/1/2013	Employee Files (...)	Destroy 2016	1.25	Linear feet
RC.2013.26	Employee Files (...)	3/1/2013	Employee Files (...)	Destroy 2016	1.25	Linear feet
RC.2012.007	Journal Entries	11/6/2012	Journal entrie...	Destroy 2016	1.25	Linear feet
RC.2012.008	Cash Receipts	11/8/2012	Cash receipts fr...	Destroy 2016	2.25	Linear feet
RC.2012.013	Cash Receipts	11/8/2012	Cash receipts fr...	Destroy 2016	2.25	Linear feet
RC.2012.018	Bank Reconciliat...	11/8/2012	Bank reconciliat...	Destroy 2016	1.25	Linear feet
RC.2012.028	Vendor Files / A...	11/12/2012	Accounts payabl...	Destroy 2016	11.25	Linear feet
RC.2013.019	Payroll (Health P...)	1/2/2012	One box contain...	Destroy 2015	1.25	Linear feet
RC.2012.009	Payroll	11/8/2012	Payroll records f...	Destroy 2015	1.25	Linear feet
RC.2012.021	Journal Entries	11/12/2012	Journal entrie...	Destroy 2015	1.25	Linear feet
RC.2012.023	Cash Receipts	11/12/2012	Cash receipts fo...	Destroy 2015	5	Linear feet
RC.2012.027	Bank Reconciliat...	11/12/2012	Bank reconciliat...	Destroy 2015	1.25	Linear feet
RC.2012.031	Vendor Files / A...	11/12/2012	Vendor files / ac...	Destroy 2015	11.25	Linear feet
RC.2012.10	Daily Post Jor...	1/2/2012	One box consist...	Destroy 2014	1.25	Linear feet

start Search Desktop 6 M... Inbo... ARL... Micr... Arch... 10:52 AM

Conclusion



- **Proactive Archivist can actively play a role in what materials come to the Archives through Records Management**
 - Step away from passive Jenkinsonian model
 - Adopt approach in keeping with T. R. Schellenberg
 - Improve and expand Archives holdings as well as fill in gaps
- **A developed Records Retention Program will help you to apply for future grants for processing and preservation**
- **Strengthens role of Archivist in everyday lives of staff**

The End



Thank You:

- Linda Tompkins- Baldwin, Former Library Director
- Emily Rafferty, Associate Librarian & Archivist

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