

# Maximum Records Management

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**P**RACTICING records management as we do, with occasional diversionary attacks in both archival and library fields, we believe that a common objective should unite, flexibly, the archivist, the librarian, and the records management analyst. I want to help smooth the path of understanding with specific data on the approach of my organization to definitive records management.

The aftermath of the study by the Hoover Commission's Task Force on Records Management was the Federal Records Act of 1950, with its emphasis on destruction, retention, and records centers on the Federal level. It might be worth while, at this time, to summarize some of the incredible findings of that study. Records equivalent to the contents of 3,080,000 four-drawer filing cabinets (with an equipment cost of \$154,000,000), and amounting to 18,500,000 cubic feet, occupying 18,000,000 square feet, burning up \$20,000,000 of annual operational and maintenance expenditures—these were some of the sensational disclosures.

Concurrently, business organizations were being engulfed by tidal waves of records that reached their crest during World War II. The movement of personnel into the armed forces and the conversion of business to wartime needs served to create what I choose to designate as records *mismanagement*, with correspondence, reports, and studies virtually out of control. Decentralization of duplicate copies frequently resulted in the confused situation where everybody kept a copy, for nobody knew who actually had the original or the copy of the original.

Into this turmoil of records mismanagement waded regulatory bodies with antiquated retention schedules, which all too often conflicted or overlapped. Systems experts, efficiency experts, records equipment manufacturers, trade associations, and technical societies attacked the problem and were repulsed by its immensity. Some of the Hoover Commission men moved their heavy artillery to industry. Unfortunately they were to learn that a *modus operandi* had

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to be developed for each type of business because of the records peculiarities, outside interests, regulatory complexities, and the tendency of business to revert to its original patterns of procrastination—its original records mismanagement. Businesses also were inclined to play up dramatic destruction without utilizing control techniques, thereby not availing themselves of *maximum records management*.

*What is maximum records management?* We believe it to be the complete utilization of scientific techniques for records control, creation, reduction, and reference. The four primary areas and the salient features of each are:

**BUSINESS MACHINES OPERATIONS** (recommendations, reports, surveys)—

*Adaptations*—acquiring maximum records management advantages from present business machines.

*Conversions*—physical conversions or improvements in business machines operations as related to records management.

*Installations*—objective studies of records management factors involved in the installation of business machines.

**CONTROL/CREATION** (recommendations, reports, surveys)—

*Communications*—specification of modern equipment for effective reference to and transmission of records data between remote points.

*Destruction, Flow, Retention*—preparation of approved intermediate and total destruction and retention programs.

*Forms and Reports*—control simplifications and improvements.

*Layout*—design and drawings, to scale, of office and records storage areas for efficient use of space and personnel and for compliance with fire and other codes.

*Motion and Time*—rationalization of motion and time aspects for greater productivity.

*Personnel*—(1) training—preparation of training manuals and job descriptions for records personnel and operations, and (2) utilization studies—analysis of personnel requirements, evaluation of present provisions, recommendations for maximum utilization, and staff reductions or transfers.

**FILING/FINDING/REFILING** (central files, general files, special libraries, subject files)—

*Central Files and General Files*—filing, finding, refiling, sorting, and transfer improvements.

*Special Libraries*—flexible and workable subject and cross reference systems.

*Subject Files*—realignment and standardization for more rapid searches and for accurate retention classifications.

DESTRUCTION/RETENTION (archives, offices, plants, records centers)—

*Inventory*—physical inventory of all records.

*Evaluation*—precise Federal, State, trade, and historical retention evaluations, with departmental flow and microfilming controls.

*Review*—operational values assigned, with destruction and retention authorizations by management.

*Destruction*—systematic disposition of unnecessary records.

*Transfer*—transfers effected in accordance with flow designations.

*Microfilming*—feasibility study and report, layout, and controls.

*Storage*—development or refinement of records location control and layout procedures.

The records management analyst researcher, thrown into a sea of business and/or nonbusiness records the classification of which often demands knowledge of both library and archival sciences, knows that greater *camaraderie* must develop among the archival, library, and records management fraternities. Maximum records management, then, must dedicate itself to that end.

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