

# Professional Training in Industrial Records Management

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THIS is the second speech I have prepared for this discussion! The first was an intemperate attack on records managers. It complained that a speaker limited by the program chairman to less than 30 minutes was under a real handicap: where could be found enough professional training to warrant so much time? It did state that considerable training has been given in archival and records center operations, and it acknowledged the training value of meetings conducted by the Society of American Archivists, the American Records Management Association, the Association of Records Executives and Administrators, and the American Management Association.

I should say, too, that my first draft acknowledged the two current projects initiated by this Society's Records Management Committee, of which William Rofes is chairman: John Porter's study of "what should be the college curriculum core for aspiring records managers" and Belden Menkus' survey of 400 colleges and universities to discover available courses in records management.

The first draft recalled the challenging definition of records management as the entire life cycle of the record from creation through disposal. And, in recalling that definition, it attacked the primitive status of training by industry and professional associations as directly attributable to the pragmatic approach of professional records managers. The draft reached its irate coda by describing a profession whose only formal text is a dated treatise on some of the more standard approaches to filing.

That first draft has been abandoned. It is the young men who are privileged to be angry, and I would prefer that together we find the reasons for the huge training gaps and prescribe appropriate remedial action.

In every recognized profession the core of training and development is in the solid base of research. Significantly, this is research

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removed from the daily "project pressures" accepted as norm by staff and outside consultants. Personnel work meant "hiring and firing" until bolstered by objective research in testing and in individual and social psychology. Engineers of all kinds would still be earth-bound were it not for breakthroughs in research far removed from both operational engines and applied research. Social workers and economists, as other examples, have the stimulating as well as reassuring support of full-time creative and objective study behind their training.

It does not require more examples to highlight the essential problem for records managers, who can rely on no similar resources. Almost without exception, even university training in records management has been conducted as an extracurricular activity. Under these circumstances the gaps in professional training correspond to the gaps in professional research.

What is even more painful is that our "collective slip" is showing. Frankly, one is a bit awed by the responsibility of developing the only cost and quantity standards available to the public on creating and processing records, for to my knowledge there is no companion piece to the standards released by the Records Management Institute. For the future, however, what should concern us are the huge areas that no one has staked out for investigation *or* training. For example, amid the welter of debates about open-shelf and "cabinet" filing, there has been a studied effort to ignore the basic fact that every office in the United States files correspondence the wrong way! File clerks and records managers alike file papers with their 11" or 14" sides horizontal for three apparent reasons:

1. It occupies more floor space than upright filing along the 8½" border.
2. It requires more steel for shelving than upright filing along the 8½" border.
3. Finally, it imposes "technical requirements," because the neck-craning to read correspondence would have to be eliminated if we filed along the 8½" border.

The fact is that folders *have* been designed to correct this situation, but manufacturers, faced with an uncertain patent protection, have been reluctant to retool. In face of this inertia, training in this area might better be defined as the bland leading the bland.

This raises another basic problem for training. As records managers, we have claimed competence in controlling the full life cycle of a record. But eight years after we celebrated at the Interagency Records Administration Conference in Washington the extension of quality-controlled paperwork operations in government as well as

industry, there is still nowhere in sight the manpower to spearhead the mass program expansion in the way quality control was promoted in industrial operations during World War II. Here certainly was a heartening example—a university drive sponsored by government agencies and such professional associations as the Association for Non-Destructive Testing (later the American Association for Quality Control). The university drive meant full-time university research and training—and only thus was acquired the knowledge to create a new and now well established profession. For the records manager, we have the reminder that even the homesteader lost his title to the land when he indefinitely postponed improving it. Finally, in an era of technology, far too many records managers have been caught embarrassingly short of breath as they attempted to keep up with machine potentials. Not so many years ago records managers were developing vital records protection programs by designating the data (and, therefore, the records) to be protected as well as the alternate techniques for providing protection. Now, company after company has installed electronic data processing without any advice from the records manager on the nature and content of the actual paperwork products, let alone the by-product tapes and cards.

If we are to avoid losing the initiative completely, should not our training of records managers require an immediate, agonizing reappraisal of our basic records? Would we have needed so much advice on information retrieval from machine technicians or from manufacturers if we had had more professional discussion about the functional specifications for a record? For several hundred years the only physical distinctions in typical company and organization records have been in converting bound books to loose files and document boxes to flat folders. Yet the complete training material on physical standards for the office now includes two terse American Standards Association releases to the public: one prescribes desk dimensions, the other officially converts the card sizes popularly known as 8x5, 3x5, etc., to 5x8, 5x3, etc. In our field, to date, there is no accepted specification for a file cabinet, no objective evaluation of alphabetic and numerical filing systems, no published standard for quality in any repetitive paperwork operation.

If records management in industry is to practice (and merit) its challenging definition of control over the life cycle of a record, professional associations like the Society of American Archivists must arrange the financing of full-time, highly competent, and objective professional staffs to spearhead research and training in this field.

The records manager has a significant function to perform. If properly trained, he has the perspective (usually lacking in technicians) to harness machines and techniques in the light of the overall requirements for written communications. It is our collective job to see that the records manager is trained to do that job effectively.

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—William L. King, *The Newspaper Press of Charleston, S. C. . . .*,  
p. 187 (Charleston, 1872).

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