

# IDP - Records Survey

Unit \_\_\_\_\_  
Contact \_\_\_\_\_

The Merrick Archives and the Institutional Documentation Plan Team are currently conducting a survey of records and record keeping practices in campus offices as part of the Institutional Documentation Plan process. These data will provide valuable information regarding where records are located across campus, the volume of records, and what types and forms of records are being maintained. The IDP team will use the data to help Allegheny address concerns about document and file organization, retention, disposition and storage across campus.

Please fill in all of the relevant blanks in this survey as they pertain to the unit you have been selected to represent. Attach additional sheets as necessary. You may request additional copies of pages if you prefer. Return completed forms to Ruth Ash at Box 117. Please call Ruth at ext. 2398 with any questions concerning the survey.

DATE: \_\_\_\_\_

1. Where are the records produced by your office stored?  
(answer all that apply)

	<u>File <b>drawers</b> (legal)</u> (estimate total number)	<u>File <b>drawers</b> (letter)</u> (estimate total number)	<u>Boxes</u> (estimate total number)	<u>Other</u>
Unit Office	_____	_____	_____	_____
Fac./Staff Offices	_____	_____	_____	_____
Storage closets	_____	_____	_____	_____
Pelletier Library (not archives)	_____	_____	_____	_____
Merrick Archives	_____	_____	_____	_____
Other _____	_____	_____	_____	_____
Other _____	_____	_____	_____	_____

2. Do you have difficulty locating older files and/or records? Yes or No (please circle one)

3. Are you running out of space for current records? Yes or No      Non-current records? Yes or No

4. Does your unit already have a records retention policy?      Yes or No      A records retention schedule?      Yes or No

5. How old are the records that are kept on hand in your unit or office? \_\_\_\_\_

6. Do you have a history and/or mission statement for your department?      Yes or No      Please send a copy to the archives if you have one.

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<b>Note the types of records kept and used by your office.</b> (Fill in information for every category of records you maintain)	<u>Restricted?</u> (yes or no)	<u>Format</u> (electronic, paper microfilm, etc.)	<u>Accumulation</u> (estimated inches or folders <b>per year</b> )	<u>Copies?</u> (original, copy, both)	<u>Usage/reference</u> (daily, weekly, monthly, yearly)
Legal or constituting documents (e.g., charters, constitutions, by-laws)	_____	_____	_____	_____	_____
Self-Studies	_____	_____	_____	_____	_____
Policy and Procedural Manuals or Documents (specify type)	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
Reports - please specify types	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
Meeting Minutes - specify by type of meeting or group	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
Official Correspondence - specify by type	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
Budgets/Audits (Circle appropriate category)	_____	_____	_____	_____	_____

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## Types of records continued

	<u>Restricted?</u> (yes or no)	<u>Format</u> (electronic, paper microfilm, etc.)	<u>Accumulation</u> (estimated inches or folders <b>per year</b> )	<u>Copies?</u> (original, copy, both)	<u>Useage/reference</u> (daily, weekly, monthly, yearly)
College Publications (give details about your publication on separate page)					
Distributed by your office	_____	_____	_____	_____	_____
Received from other offices	_____	_____	_____	_____	_____
Enrollment Records	_____	_____	_____	_____	_____
Syllabi	_____	_____	_____	_____	_____
Faculty Vitae	_____	_____	_____	_____	_____
Class Schedules	_____	_____	_____	_____	_____
Student Transcripts	_____	_____	_____	_____	_____
Senior Projects (comps)	_____	_____	_____	_____	_____
Graduation Rosters	_____	_____	_____	_____	_____
Transcripts of Speeches/Presentations (e.g. graduation, convocation)	_____	_____	_____	_____	_____
Records of Student Organizations - please specify	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
Student/Alumni Records (i.e. various material filed together by student.)	_____	_____	_____	_____	_____
Artifacts    (relating to or created by the institution)	_____	_____	_____	_____	_____
Other records/papers produced by individuals connected with Allegheny.(e.g., private papers, books & articles by faculty/staff past & present)	_____	_____	_____	_____	_____
Records of other units/departments	_____	_____	_____	_____	_____

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### Types of records continued

List here any other types of records filed in your office that do not fit in the previously defined record types.

Specify each type on the lines below.

[illegible]

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ALL Publications produced by (Fill in Department or Group):

[illegible]