



## Specific Advice for Retiring Deans and Senior Leaders - VERIP

The Harvard University Archives (HUA) is acutely aware of the important contribution your work has made to the life of the University. Since most HUA staff are working remotely and Harvard Depository service hours are limited, what follows is a streamlined set of recommendations for addressing retiring deans and senior leaders' University records. Harvard's records – one of the University's most valuable assets – serve as evidence of the University's organization, functions, policies, decisions, procedures, operations, and other activities. These created, received, recorded, or legally filed in the course of University business or in pursuance of the University's legal obligations.

### What to Keep

**Many of the records of deans and senior leaders, including all business email, need to be kept by the University.** Due to the nature of senior positions, most administrators' records contain significant policy and decision-making documentation, some of which may need to be handed over to colleagues for business continuity. Examples of records could include:

- [executive correspondence](#), including email and [calendars](#)
- [committee and standing committee records](#)
- [Visiting Committee reports](#) and [Board of Governors correspondence](#)
- [planning and proposal records](#) concerning university-wide, faculty-wide, or inter-faculty initiatives
- records concerning [policies](#) and [procedures](#) with University-wide or faculty-wide application
- [program annual reports and program establishment, management, and review records](#)
- [accreditation records](#)

For further guidance, please see the University's [Executive and Management Records Schedule](#).

### Dos and Don'ts

- Some of your records may need to be kept by your office to refer to after you leave for legal/regulatory reasons or administrative precedent. Do locate and communicate to HUA a secure location for your paper records in your office. HUA may be able to make arrangements with your office to send the boxes to off-site storage at the Harvard Depository (HD). Under current limitations on depositing new materials at HD, we will be able schedule pick-up of boxes from some offices before the end of the December and will be in contact with the remaining offices in 2021.
- Do identify and remove any personal, non-work materials in your paper records. Identify and remove any personal email and digital/electronic content from your Harvard accounts.
- Do order empty boxes for packing up paper records. HUA can help with ordering empty boxes for delivery to your office. Place your order from [archives\\_rms@harvard.edu](mailto:archives_rms@harvard.edu) no later than Wednesday morning for box delivery on Friday. **The last day before the winter break to order boxes to store your records on campus is Wednesday, December 16, 2020. These boxes will be delivered on Friday, December 18.**
- Do use the Executive and Management Records Schedule to help describe the records in each box. At minimum, the description should include a brief description of the contents, including begin year-end year and GRS records codes. If time permits, creation of a

box/folder list by staff is optimal and will assist your colleagues needing access to records in the future.

- **Don't** spend time reorganizing your records!

**The HUA team is here to support you!**

- For guidance on electronic/digital records, including email accounts, please see HUIT's [checklist for retiring staff](#).
- HUA recommends that you or your staff set up a virtual appointment with us to answer questions and advise you via [archives\\_transfers@harvard.edu](mailto:archives_transfers@harvard.edu).

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