



Local Records Grants: Lessons Learned from Previous Organizing the File Room Grantees

Purpose: Provide guidance shared by previous grantees with prospective Organizing the File Room applicants.

- “It is important to have all City department heads aware of the project that may (will) require scheduling of other department personnel to complete the project.”
- “Watch all webinars, utilize all the info on the Archives website, and also the Archives staff. They are extremely helpful and patient. Be thorough in creating a plan that touches on all items the grant committee is looking for. Sort like items into sections, label everything immediately, and be sure to document full information into destruction and transfer logs so you don't have to revisit them later. Think outside the box and make things simple in the way that works best for you.”
- “Look at the grant's allowed expenses, first. We had picked out wooden shelving, initially, and discovered it was not okay, which easily could have prevented our application from being chosen in the first place and ended up affecting our overall budget.”
- “My biggest lesson is that this is much more time consuming than expected. Plan, prepare, budget, and then know that it will take more hours than you expect, especially if you are dealing with records from the beginning of the organization, or if there are changes at your agency.”
- “My advice would be to start small and with what you know for sure, like receipts well outside of retention. This ended up being almost half of the records I was able to destroy. Once I organized all the boxes I had into categories and DANs I started with the smaller piles, and those that were more organized, in order to get a feel for what I was doing. Then by the time I got to the larger piles that were a mess, I felt more confident in my understanding.”
- “The best value for effort is to use the project as an opportunity to set up a plan and processes that are repeatable and doable going forward, not just to clear out the backlog from the past.”
- “Don't be in a rush to get stuff into the shred bins. The records are still fair game if a PRR comes in while the documents are still on the premises (in the bins and now not sorted).”
- “If *all* your records aren't centrally located and already under your control, expect it to take time to gather documents. Each employee will need time for decision making and handwringing. We were only able to complete the process for two or three employees each month.”
- “Communication and planning ahead will make the archival transfer process at the end easier.”

**Additional advice regarding the management of public records is available from
Washington State Archives:**