



Why Records Management?

At its core, records management is

- understanding what records are being created,
- how they are used,
- how long you need to keep them for,
- how and when to get rid of them if you can, and
- how to save them if you need to save them.

Records document our work, providing evidence of policies and procedures and forming the basis for future decision-making. Records management is often an after-thought, but the more you know about the final disposition of a record, the better the choices you can make for its creation and maintenance, especially at times of rapid change.

Disposition:

The last thing that happens to a record after it is no longer actively used in your office – either destruction of the record or transfer to the appropriate archival repository.

Records Management Now

At this time when things are changing quickly and we are responding in real time, remembering records management is more important than ever. Managed records are an asset that helps you

- ensure that the right people can find and access records in a timely manner,
- ensure that unauthorized people cannot find or access records,
- reduce risk and liability and protect personal or sensitive information,
- streamline business activities, and
- provide evidentiary documentation of our communities and a historical snapshot of how our governments work, what is important to our citizens, and how things change over time.

Examples of Permanent Records Series

While not all inclusive, the following are examples of record types that have a permanent disposition that your office may be creating in response to the COVID-19 pandemic. If you have questions about how to manage permanent records, whether in physical or digital format, contact the Records Management Unit at retentionhelp@sec.state.ma.us.

State-wide Agency Records Retention Schedule

- Disaster Planning Records: Final Plans [A01-06(a)]
- Policy and Procedure Records: Manuals, publications, bulletins and substantive support materials [A02-03(a)]
- Executive Orders, Directives and Bulletin Records: Final Issuances and substantial support materials [A02-03(a)]
- Program Outreach and Training Records: Substantive planning documentation and summary presentation materials [A05-03(a)]
- Program Publication Records: Final official publications [A05-05(a)]
- Public Relations and Communications Records: Substantive records reflecting decisions, issues, concerns and events [A08-01(a)]
- Media Advisories and Releases Records: Final official releases [A08-02(a)]
- Meeting Minutes [A12-03]

Municipal Records Retention Schedules

- Directives – Originator's Record Copy [01.150]
- Public Relations and Communications Records: Substantive records reflecting decisions, issues, concerns, events and publications. [01.204(a)]
- Historically significant records [01.158-01.162 allow you to designate a broad range of records as historically significant]
- Open Meeting Law: Meeting minutes [01.074]

A pdf of the State-wide agency schedule is available at http://sec.state.ma.us/arc/arcpdf/MA_Statewide_Records_Schedule.pdf. A pdf of the Municipal schedule is available at http://sec.state.ma.us/arc/arcpdf/Municipal_Retention_Schedule_20200406.pdf (recently updated!) Or you can access both schedules in this online database. <http://retweb.sec.state.ma.us/retweb/default.asp>.