



## THE JANE CARLSON WILLIAMS '60 ARCHIVES MISSION, HISTORY, AND COLLECTIONS MANAGEMENT POLICY

### **MISSION**

The mission of the Jane Carlson Williams '60 Archives is to collect, organize, preserve, and make available for research, records and artifacts documenting the history of Lakeside and St. Nicholas schools, and to integrate this history into the lives of Lakeside community members.

### **HISTORY**

Lakeside's archives program was endowed, in 2002, by the Apex Foundation through a generous four-year financial commitment by Jolene and Bruce McCaw '64. Jane Carlson Williams '60, is a graduate of St. Nicholas School and long-time supporter of Lakeside. Williams served as president of the Alumni Board from 1979 to 1980, president of the Board of Trustees from 1986 to 1988, and Director of School Relations from 1996 to 2001. Williams received the Distinguished Alumni Award in 2010. In recognition for her outstanding contributions, Jolene and Bruce McCaw named the school's archives in her honor. The Jane Carlson Williams '60 Archives was created to ensure that the history of the school would be preserved and integrated into the lives of students, alumni, parents, friends, and employees past and present.

### **COLLECTIONS MANAGEMENT POLICY**

Revised October 2016

#### **Statement of Purpose**

The Jane Carlson Williams '60 Archives consists of materials by and about Lakeside School; St. Nicholas School, with which it merged in 1971; Moran-Lakeside School, the predecessor of Lakeside School; and Moran School on Bainbridge Island, the impetus for the founding of Moran-Lakeside School.

#### **Statement of Authority**

The archives was established under the auspices of the Board of Trustees of Lakeside School and is charged with collecting, preserving, and making accessible materials related to the history of the school. The archivist is responsible for establishing policies regarding the selection, appraisal, preservation, arrangement, description, and accessibility of the collection.

### **The Archives Program**

The archives strives to preserve institutional memory by collecting significant materials that document the origins, development, policies, programs, facilities, and activities of Lakeside School. The materials collected must have long term historical and/or informational value. Materials are preserved for research and outreach purposes.

The archives collects both the official and unofficial records of the school. Official records are those non-current records created, received, and maintained by school administrators, faculty, and staff in the course of their work. Unofficial records are those which come from other sources, such as members of the public, students, alumni, and parents, but which reflect the life of the school.

### **Clientele**

The archives serves the needs of a wide range of constituents. Many of these users are internal such as current faculty, staff, students, and parents. Other users include board members, emeritus faculty and staff, alumni, and prospective parents and students.

The archivist also responds to requests from researchers outside the Lakeside community as time and resources allow.

Although the collection is retained and preserved for use, access to the records may be restricted due to school policies, privacy concerns, or according to conditions requested by the donor.

### **Acquisition Focus, Strengths, and Weaknesses**

The archives' mission to document the history of the school begins with the collection of non-current official documents, such as those created by school offices as listed on the school's Records Retention Schedule. Other areas of collection include records documenting student life and organizations; records dealing with policy; and records documenting the development of programs, projects, and school facilities and buildings. In addition, records and artifacts recording the life and work of faculty and alumni are also collected, to the extent that they reflect the history of the school.

Prior to the establishment of the archives in 2003, each school office/department had retained its official records. Collection of official records has been haphazard in the absence of a records retention schedule that accurately reflects the school's records. In 2009, a retention schedule was created, but as it was a reaction to new laws rather than a proactive attempt to evaluate the school's records creating practices, the collection of official records has remained haphazard. As of October 3, 2016 the archives contains official school records collected by the archivist; materials donated by alumni and faculty; school publications and memorabilia; and a large collection of photographic records. Weaknesses in the collection include official records of St. Nicholas School and records created during the early electronic era: 1990s to early 2000s.

In addition to subject area, the collection is bound by certain other guidelines. Records are comprised predominantly of English language materials (with the possible exception of foreign study program materials). Geographic and chronological constraints limit the collection to Lakeside and St. Nicholas properties and facilities. Records may be in any media (such as print, digital, or audio-visual) or format (email, slides, databases, or 8 millimeter film).

### **Electronic Records Preservation**

Although the archives collects records of all formats, as of October 3, 2016, the archives does not have a dedicated electronic records preservation system. Electronic records (born and created) are stored in a folder directory system on a dedicated archives server. The classification system mirrors the archives physical storage classification system and electronic files are named and saved according to that system. Nightly back-ups are performed and the archivist creates a back-up each week that is stored offsite for preservation purposes.

### **Cooperative Agreements**

The archives works closely with the Lakeside School Libraries to ensure access to Lakeside contributed histories and primary resources. The libraries also maintain a limited collection of alumni publications.

### **GIFTS POLICY**

The archives welcomes the donation of records and artifacts that add something significant to an understanding of Lakeside/Moran-Lakeside/St. Nicholas School's origins, activities, functions, events, programs, culture, community, and changes over time. All materials given to the archives become the exclusive property of Lakeside School. If it is deemed advisable, a gift to the archives shall be conveyed by a deed or other legal instrument describing the material, stating any use restrictions, and listing any exceptions to the conveyance of full property and literary rights. The archivist shall have the right to dispose of gift material in any way she/he wishes.

As an interested party and for the protection of its donors and itself, the archivist will not appraise gifts to the archives. However, she/he may suggest to a donor that an appraisal is desirable and assist in obtaining one. Donors are able to place reasonable restrictions on a gift, with the approval of the archivist and/or Archives Committee. Such restrictions will be noted on the Deed of Gift form. All gifts are subject to a selection process by the archivist, who will write a letter of acknowledgement to the donor, whether or not the items donated are accessioned into the collection. The selection process is guided by this collection policy and by the premise that accepted items are of sufficient historical value to warrant permanent preservation.

Once items are accessioned, they may not be physically removed from the archives unless the archivist has deemed physical removal appropriate or required.

## **DEACCESSIONING POLICY**

Periodically materials may be reappraised for retention in the archives and deaccessioned for one of the following reasons:

1. Physical condition: if the item has deteriorated to the point where it is no longer accessible for research purposes or is a threat to other items in the collection.
2. Duplication: if the item exists in multiple copies or a copy in better condition replaces it.
3. Migration: if an item is migrated to a new, more accessible format, the older version may be deaccessioned unless information has been lost through the migration, or the new format is less stable or degrades more quickly than the original format.

Deaccessioned materials may be discarded if warranted by their physical condition. Duplicate materials may be retained for outreach purposes or classroom workshops. Otherwise deaccessioned materials can be transferred to other departments on campus or to other archival repositories; returned to a donor, if that is part of the donor agreement; or given to the Lakeside Parents and Guardian's Association Rummage Sale.

### **Procedures for Monitoring and Revising the Collection Policy**

The archivist, in consultation with the Archives Committee, has developed this collection policy, which will be periodically reviewed for continued relevance and accuracy.

Most recent revision of the policy: October 2016 by archivist Leslie Schuyler