

Records Transfer Guidelines

Overview

The University of Houston Archives works to document, preserve, and make accessible the recorded heritage of the University of Houston and its community of faculty, students, staff, and alumni.

There are many advantages to transferring your records to the University Archives, including:

- The *University of Houston System Records Retention Schedule* legally requires numerous records to be transferred to the University Archives or assessed for enduring historical value by the University Archivist.
- The University Archives can provide limited reference service and access to records.
- The University Archives provides secure, environmentally stable storage for records necessary for their preservation.

Collections Policy for University Records

University departments and offices should consult the [University of Houston System Records Retention Schedule](#) to determine which records must be transferred to the University Archives and which will require an assessment by the University Archivist. There are additional materials that don't fall within the *Records Retention Schedule* but still should be transferred to the University Archives. Records transferred should be of long-term value but not needed for day-to-day administration. The most common types of long-term records with historical value include (but are not limited to):

- Administrative reports (particularly annual and biennial reports)
- Biographical records
- Committee records
- Correspondence
- Photographs
- Policies and Procedures
- University of Houston publications
- Special events records

Materials that **should not be sent to the archives** include:

- All blank forms and unused printed or duplicated materials
- Papers, reports, working papers, and drafts that have been published (excluding university publications, which we do take)
- Artifacts and memorabilia (most). The University Archives does not collect artifacts related to the University's history except in cases of great importance and with

manageable physical size and condition. Please contact the university archivist to discuss options for the transfer of artifacts.

Departments and offices should schedule a yearly transfer date with the University Archivist to ensure records are transferred in a timely manner. Please contact the University Archives at 713-743-5893 or mmmanning@uh.edu if you have any questions regarding the transferring records, and to schedule and assessment or transfer. **If in doubt, don't throw it out.**

Legal custody of transferred records is passed to the University Archives upon the receipt of the records by the University Archivist. Transferred materials without adequate historical significance or required retention will be disposed. Please note that transferred records **cannot** be recalled by the department or office once transferred and accepted. Access to such records will be provided only in the Special Collections reading room. Simple reference questions from the transferring department can be answered by University Archives staff.

Prepare Records for Transfer

Prepare records according to the following guidelines before transferring them to the archives.

- All files should be transferred to the University Archives **in the original order in which they were used.**
- Place records in standard record boxes (12" x 15" x 10") [such as this](#). Please do not use other sizes or box types as they may not fit on our shelving.
- **Do not bend, fold, or roll oversized or oddly shaped items** (such as posters), but first contact the University Archives for assistance with storage
- Boxes should be full but not overstuffed
- Remove and replace any hanging folders with file folders
- Number boxes sequentially, including the total number of boxes being transferred (e.g. 1 of 10, 2 of 10, etc.)

University Archives will accept electronic records already on a CD, DVD, thumb drive, or external hard drive. If the files are on a computer, please contact University Archives for assistance in transferring your electronic records.

Records Transfer Form

Fill out the Records Transform Form, including an inventory list of what is being transferred to the University Archives. For electronic records include the types of files (e.g. Word document, PDFs, etc.) in addition to the total size. Email the completed form to the university archivist **before** making arrangements to transport materials.

Transport to University Archives

Please contact the university archivist at mmmanning@uh.edu or 713-743-5893 to arrange delivery of your materials to university archives. **IMPORTANT: Do not drop-off materials without first notifying the university archivist.**