

Preserving the Old School Tie¹ – Why school archivists find it hard saying ‘no thank you’ to the fifth donation of a rowing oar²

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Preserving the Old School Tie looks at the challenges, influences and real world factors affecting appraisal decisions by archivists in independent non-government schools. By exploring the role of the archivist and the archives in the school community, the article examines the complexities of appraisal in school archives.

Every archivist would agree that appraisal is the most critical and difficult function in the archival process because it determines the size, shape, colour, texture and content of our archival collections. As Terry Cook once quoted, appraisal is ‘the greatest professional challenge to the archivist’.³

Yet why is the process so difficult? After all, isn’t it merely ‘the process of determining which records should be retained permanently...according to a series of values’⁴,

and is it not the acquired skill of all professional archivists to recall those values when making appraisal decisions?

Margaret Norton in *Norton on Archives: The writings of Margaret Cross Norton on Archival and Records Management*, discusses the art of appraisal:

In making an appraisal certain questions should be asked. Is this the original, official copy of the record? Who made this record? Who uses it? What purpose does it serve? What information does it give? Who should be inconvenienced by the destruction? Is the information contained in this record obtainable elsewhere? If so, where and in what form? If the information is found elsewhere is this record essential to establishment of the legality or authenticity of the information found in the other record? If two records cover the same ground, which would be the one taken to court?⁵

In a school archives, which is typically an in-house archives that has a museum (heritage) collection included, the basic appraisal theory of determining which records and objects should be kept or chosen because of their evidential, informational or significant meaning, is in practice never as logical or straightforward. Indeed appraisal is an indefinable art as '[it] is not a science, [nor] a mechanistic or formula-driven process that somehow magically produces a definitive, correct, infallible answer'.⁶

The first half of this paper presents a fictional case study that examines the typical responsibilities and appraisal dilemmas an archivist working in the independent secondary school environment is likely to face.

The second half of the paper discusses those appraisal challenges and the solutions found by school archivists to address those problems.

Case Study

You are the recently appointed archivist of an independent secondary boys school in your capital city. Your brief and purpose as the "inaugural archivist" is to not only establish the school archives, but to organise the identification, collection and collation of historic school records and memorabilia for the school's centenary, which will be celebrated in two years' time.

Up until your appointment the "archives" has been the space under the stairwell and in a few cupboards where all the old registers, class roll books, school photos and yearbooks have been stored. The school has never paid much attention to its "archives" before but suddenly the Headmaster realises, with its centenary nearing, that not only do most well-established and well-appointed independent schools in Australia have a designated office and storage area called 'The Archives', but they have a paid professional archivist to maintain and protect the collection, and to produce displays of historic photos and memorabilia for significant occasions.⁷

The School Council envisages as part of its centenary celebrations a public display of school memorabilia and photos in the local council library and/or community art gallery. The problem is that the museum collection, two years out from the centenary, is a bit light on memorabilia. Someone has dutifully kept all the enrolment registers, council minutes and other administrative paper-based records, but there are no great 'show and tell' items.

This is your first appointment where the distinction between the school archives and school museum collections are blurred and intertwined. A visit to a few of the other local independent school archives confirms that this is not unusual – most schools have an in-house archives with a museum attached.

One of your first tasks is to compose an archives mission statement which clearly outlines your objective to collect, document, preserve and manage those records and items which document the origins, development and history of the school. It also declares that the Archives functions as the memory vault for the school's staff, students, families, friends and associates, past and present. Of course this statement is meant to be non-specific but it still provides a clear indication of the purpose of the archives.

Your job description states that as the archivist you are the person primarily responsible for the appraisal, selection and disposal of the school's administrative records, photographic and museum collection, and for the arrangement, description, care and custody of those records according to currently accepted standards of archival practice and administration. As a professional archivist, and usually a lone arranger, this autonomy in the archives is not only liberating but also quite daunting because the responsibility of appraising all in-house and externally donated records and objects falls squarely on your shoulders.

To encourage donations of old school uniforms and memorabilia, you place a notice in the school's quarterly magazine which is sent out to school community members and old boys. You appeal for donations of old school photos, sporting trophies and blazers and anything else that might be useful in the centenary display and later become a permanent part of the archives' museum collection.

At first items come in slowly. A few old boys offer some sporting team photos, a few old year books and a couple of nice Hardy Brothers silver athletics trophies. One family offers their grandfather's blazer pocket from 1915, which is the oldest piece of original school uniform the archives will have to display, and predates the current blazer. A former Australian Wallaby player donates his school rugby jersey and rugby honour cap from 1932, and a current famous Australian Hollywood actor sends you his old prefects' school tie.

You even stumble upon a find of your own. A retiring member of staff, who has taught at the school for 35 years, tells you that there is a "whole lot of stuff" underneath the stage in the assembly hall. He remembers at the end of each school year senior masters getting boys to carry boxes of files and photos to the hall as part of classroom and office clean-ups. He also tells you there is a storage area under the chapel full of old classroom furniture and science display cases. You find original student records, Headmaster's correspondence, paintings, school photos, old cadet uniforms and sporting equipment. The school has even kept the old school barber's chair.

It's exciting discovering all these forgotten storage areas filled with administrative records and objects, and a pleasure accepting donations of memorabilia because, with each item, you are learning a little bit more about the school's history and the students who attended. You begin to wonder how many other school "treasures" have been kept by old boys and if they'll ever find their way to the archives.

Then something takes place that challenges the way you usually manage acquisitions and make appraisal decisions. Ten old boys call you one week all offering the same thing – their school boater. Like most traditional independent boys schools the school uniform hasn't changed much in the past seventy years, and in fact the boys have been wearing the same boater with the same hat band and school crest from day one. Each boater, on its own, passes your selection criteria, but instinctively you know you don't need ten samples of the same thing.

Ten school straw boaters⁸ and they all look exactly the same. Even though some are much older, they are all in pretty good condition, and each one belongs to an ex-student from a different era in the school's history whose experiences at the school are fundamental to your understanding the school's growth and development. You rely on their accounts and memories to bring to life the former Headmasters and teaching staff, customs and rituals that no longer exist. Three of the donors are more prominent, well-known and wealthier than the others and a significant monetary donation for the school accompanies their boater with the condition that their hat will be on permanent display. The problem is do you accept all ten and therefore set a precedent for future donations of like items, or do you turn away those donors whose boaters do not come with cheques and risk offending those families in the process?

Acquiring ten boaters (and who knows how many more waiting in the wings) under these circumstances seems a little bit rich. Each hat with its wide straw brim takes up significant box and shelf space, which is disappearing quickly. You begin to wonder if an offsite storage facility would solve your immediate need to

clear your floor space, but your budget does not allow for much more than a hundred type 1A boxes and some acid free folders.

Your archives office and storage area is filling up fast, not only from donations of memorabilia from ex-students, but from the non-current records of teaching and administrative staff who are now treating your office like the local tip.

Now that there is an archivist on the staff, everybody from the Headmaster's secretary to the sportsmaster wants advice on how to manage their filing systems. The accounts office even wants you to "clean up and clear out" their records which have been kept – untouched – in the boarding house basement for the last fifty years. Then the property office sends you untold numbers of maps and building plans because 'they should be kept in the archives' and they have been looking for somewhere to store them for years.

It's all becoming too much to handle and you've only been employed to work three days a week, school terms only. All the boxes, plans and files need to be sorted and appraised, but there just isn't enough time. The school will be celebrating its centenary in two years time and planning for these displays needs to start soon – and you have ten boaters stacked on a chair and ten old boys waiting for a letter of acknowledgement. Plus, you've just been informed the School Council is coming to visit your office on Monday afternoon, thus requiring a report on the progress you have made with the Archives, the donations you've received and your thoughts on how the Archives will contribute during the centenary celebrations. It's Friday afternoon, it's 4:30 pm and it's time to go home – the School Council, the boaters and the centenary can all wait until Monday.

Everyday issues and challenges

Ask any school archivist and they will tell you that the greatest challenge to working in school archives is actually being the school archivist.

The first challenge you face is accepting your responsibilities as a) the sole keeper, protector and selector of school records and memorabilia for permanent retention; b) the curator and conservator⁹ for the photographic, museum, textile and art collections; c) the exhibition manager for all photographic and memorabilia displays; and d) the part-time ex-student liaison officer, goodwill ambassador, unofficial school historian and electronic records expert.

The second challenge is actually finding time in the average working day, week or year to make appraisal decisions, accession boxes, and arrange and describe items in the collection. Most school archivists work one or two days a week, school terms only with no clerical assistance. Because they work part-time, some are employed at more than one school.

The third challenge is defining your role within an institution where you are an adjunct to its primary focus, which, of course, is education. The challenge for the archivist is to remain relevant and significant in the school's academic and administrative structure and not just an optional extra. One way of doing this is to use the archival collection to teach students and staff about the school's history, the changing face of education, and provide resources from which the school can make informed decisions about its future development. After all, it is 'the creation of meaningful and usable records and the appropriate maintenance of those which...constitute the pillar on which a society rests and evolves'.¹⁰ With the substitution of 'school' for 'society', we can understand the significant role the archival collection should play within a school environment.

Of the 105 primary and secondary schools in Australia that have archives,¹¹ over 95% are independent, non-government schools. Public schools in all states are governed by state records legislation, but private schools are free to control the selection, disposal and use of their records, once they have fulfilled legal requirements.

To ensure that records of historic and permanent value are not carelessly, or mistakenly, destroyed, it's very important for the school archivist to have a close working relationship and good level of understanding with the creators and keepers of those records. The school archivist should be promoted into such a position so that they are the only ones making primary record appraisal decisions for the school.

The archivist, with their broad corporate knowledge of the school's history and familiarity with the archival collection, will have the most clear and consistent understanding of the rules, guidelines and constraints that govern the record keeping requirements of the school. They are the best person in the whole organisation to understand the long-term value of the records created. They have a duty to actively collect and seek out those records and items of memorabilia that document all facets and aspects of the school's life and its existence in the community.

School archivists sort through large amounts of school records (paper, electronic and object based), choosing series and items which have the most permanent and significant value. A school archivist knows intellectually that not everything can be kept, but in practice deciding what should be is a huge responsibility, especially since disposal schedules for school archives are generally not available for guidance.

Appraising series and items for permanent retention can be difficult considering there are no other archivists in the organisation to consult with or offer advice. To help with this imbalance, the national and state branches of the Australian Society

of Archivists' School Archives Special Interest Group provide essential professional support to all school archivists across Australia. In times of doubt and uncertainty school archivists consult with each other, and use other colleagues' experiences and decisions as points of reference and solutions for their own appraisal problems.

Professional development days are organised by the School Archive SIGs to discuss issues such as electronic records in the school environment, and the effects of freedom of information and privacy legislation in school archives. Currently, members of the New South Wales and Western Australian School Archives SIGs are working together to construct a guide to recordkeeping requirements and disposal in schools, which will help both the professional and untrained school archivist make appraisal decisions. Considering that few independent schools have an endorsed in-house disposal/retention record schedule to provide guidelines to teaching and administrative staff of their record keeping requirements, this is a most welcome project.

Student records are probably the largest and most complicated series of records to be kept in a school archives. By definition they are those records that contain personal information about a past or current student. Student records can be enrolment registers, class roll registers, mark books, detention and punishment registers, clinic records, applications for admission, bursary and scholarship documents, sick notes, late notes, accident reports, exam results, student references and counsellor reports. These are private records and as such belong to the individual student. They can be sourced from many different departments within the school – and each record is, of course, unique to each student. The largest quantity of student records come from the enrolments office and from housemasters and tutors. These records contain highly personal and confidential information, therefore the dilemma for school archivists is knowing how to appraise these records. In Terry Cook's UNESCO RAMP study "The Archival Appraisal of Records Containing Personal Information", he describes these files as 'Continuing Events Case Files'. These files document the interaction of the individual with the school in several related, but separate events, often covering several years or even decades.¹²

Sampling is often a recommended method used to appraise case files in order to reduce large quantities but preserve examples of the file. As Terry Cook explains, 'records containing personal information have many characteristics relating to both their physical format and the circumstances or context of their creation'.¹³ Because these files contain both evidential and informational content it is difficult to sample student records as a whole or cull documents from within. It is this characteristic that causes the greatest amount of conflict when approaching the appraisal of student

records. Some school archivists have the opportunity to weed superfluous information from the files, examining each document relating to a student on a case by case basis. Others are not so inclined nor have the time. Some ask why schools are keeping them at all when the statute of limitation obligations expire. There are no right or wrong answers, which produces an appraisal conundrum for all school archivists when dealing with student records – hence the idea of appraisal as being an indefinable art.

Another more prosaic reason lurking behind some appraisal issues is the issue of shelf and storage space, a precious commodity in any archives, but more so in a small archive. Appraisal decisions need to strictly adhere to the boundaries outlined in the archives mission statement/collection policy. The decisions need to be transparent and made with the best interests of the school in mind, otherwise collections become idiosyncratic and precious space is wasted on records that just don't belong in the collection. Administrative records (correspondence, board minutes, master plans, student files) have to compete with museum objects and photographs for shelf space, for although they are two disparate collections, they generally exist side by side.

Of all the major influences and criteria a school archivist needs to take into account when appraising a series of records or collection of items, however, the dual issues of politics and the dependant relationship a school has with the school community as a funding source can override all other contributing factors. Whilst appraisal decisions are the archivist's responsibility, at times the Headmaster will answer on the archivist's behalf. Even as professionals, sometimes the archivist is forced to submit to external situations – because 'appraisal is sometimes taken out of the archivist's hands by political pressure'.¹⁴

Donors of memorabilia who are ex-students, children of ex-students and partners of ex-students, always have the potential to become something more – benefactors. As government funding to independent schools steadily decreases, the need for voluntary donations of money from the ex-student body increases. The archivist usually has to accept all offers of memorabilia donations that are made even if they fall outside the collection criteria and even if there just isn't enough room. If an offer is not accepted the archivist risks offending the ex-student and their family, which could potentially strain a delicate relationship that the school has been nurturing over many years. 'It is very easy to justify retaining or accepting something...but [it is] intrinsically difficult to justify destruction or refuse an offer'.¹⁵

The archival collection is one of the most important promotional tools the school has. The Bequest Committee increases its chances of acquiring much needed money for the school if archival displays are marketed directly to the guests at their

functions. The archival collection is the soft sell in the school's approach to financially well endowed ex-students, and the historical articles in the school's quarterly magazine do more for garnering sentimentality and inspiring monetary donations than any direct marketing could possibly hope to achieve.

As school archivists, it is our job to intimately know the history of the school. But the history only comes alive when it is enriched by the ordinary, every day administrative records of the school and when the school community donates unique and eclectic items to the collection. Like every other collecting institution, our collections are enhanced by the donations, but unlike more corporate institutions, very few gifts would be refused or de-accessioned – for the archives are 'the keeping place of our School story'.¹⁶

School archives contain both extremely personal information and extremely personal items. Every donor is thrilled when they receive their letter of acknowledgement from the archives for their gift, see their collection displayed, or mentioned in an article. Our collections validate the existence of our ex-students, returning to them their younger glory days, when youth and dreams prevailed. And our collections ensure that the current student body realise that the present will soon be the past, as there is no sharper reminder of time passing than farewelling each successive Year 12.

So, whilst in other archives the disposal schedule allows them to retain two straw boaters and destroy the remaining eight, thereby freeing up much needed shelf space, the school archivist has accepted all ten, along with five rowing oars and twenty prefect's badges. Storage space, whilst precious, can fade into insignificance as you watch your oldest ex-student as he holds his rugby jersey and tells you how his goal won the championship shield for the school. There may be no floor space to speak of, but moments like this bring the collection to life and are a special part of a school archivist's day.

Our archive collections are what provide us with our school culture and identity – but it is the way the archives and archivists are used, who makes the most use of them, and what is ultimately kept, that will determine our future.

Increasingly, younger schools are becoming aware of the need to be more professional about their recordkeeping obligations and requirements, and so are hiring archivists to fulfil those needs. This means that in some schools the appraisal of school records is happening a lot sooner in the records continuum and so the archivist has more influence in the creation, storage and retention of administrative school records.

Appraisal solutions for the school archivist

The question then remains: how do the appraisal decisions we make fit into the greater context of the school's main function – that of education? And how do we remain relevant and necessary?

At a 1979 school archives seminar, Dr G E Sherrington claimed that 'ideally what I would like to see is school archivists also playing the role of part- sociologist and anthropologist actively recording the less obvious and unrecorded activity of school children eg: games in the playground...'.¹⁷ So whilst administrative records denote the day-to-day workings of the school, they can also, in the form of detention slips and absence notes, boarding house menus and school magazines, denote what it was like to be a student.

School archivists are not just archivists. Our issues of appraisal are not limited to the paper-based or electronic record. We are the keepers of the stories within the student files, maintaining not only the administrative history of the school but also its social history, its culture and its life.

Dr Susan Emilsen, the author of "The Lily and the Lion: a history of Abbotsleigh", wrote of school archives:

[they]...are rich in lists: the names of teachers and students, the curriculum. They often preserve rules and codes of behaviour, as well as...the official aspirations of the school. These archives [can be] less rich in sources that reveal what it felt like to be a student...or what difference, if any, their schooling made to [their] subsequent lives. Examining the archives, we can only guess, for example, at what students ate, what games they played, what they read outside the classroom, how they spent their holidays, what they thought about the school, how many rebelled against it, how many were deeply affected by their experience there.¹⁸

When the school community donates items and personal memorabilia to the archives, items which round out their student experience, the archives grow, the school comes alive, and the history behind the school's history is discovered. This is why school archivists find it so difficult to adhere to any collection policy – for by doing so, we might be missing out on a previously unknown piece of the past.

This is why appraisal in the school archive environment is so difficult. We are not dealing with just the evidential record, the non-personal, we are dealing with the history of education, of a community, of children. By conjoining the archives with the museum, and the administrative record with tangible evidence of students' lives, we create a living archives – the indefinable art of appraisal has a role here, not a hard and fast collection policy.

ENDNOTES

- 1 The Old School Tie was the name of an exhibition which celebrated Melbourne and Geelong's early educational history. The exhibition used over 650 objects and images from 14 government and independent schools. It was held at the Old Treasury Museum in Melbourne from 6 August – 3 October in 1999. The joint curators of the exhibition were Kenneth W Park and Helen J Stuckey.
- 2 Borrowed from the title of Anne Cooke's *Archives and Manuscripts* article (Vol. 19, May 1991) 'What do I do with the rowing oar? The Role of Memorabilia in School Archives'.
- 3 Terry Cook, 'The archival appraisal of records containing personal information: A RAMP study with guidelines', [prepared for the] General Information Programme and UNISIST, Paris, UNESCO, 1991, Chapter 1.12
- 4 Cook, Chapter 2.9.
- 5 Thornton W. Mitchell (ed.), *Norton on Archives: The writings of Margaret Cross Norton on archival and records management*, The Society of American Archivists, Illinois, 1979, p. 240.
- 6 Michael Piggott, *Appraisal – the state of the art*, paper delivered at a professional development workshop presented by ASA South Australia branch, 26 November 2001. He also discusses nine 'universal appraisal truisms' – for further reading, see www.archivists.org.au/sem/misc/piggott.
- 7 Indeed, this appears to have been the major impetus behind the establishment of many archives in schools. See Baiba Irving in *School Archives: Proceedings of a Seminar held on 15th September 1979*, organised by the School Libraries Section (NSW) of the Library Association of NSW, together with the Australian Society of Archivists, 1979, p. 3: 'School archives are very often started in conjunction with a school anniversary or the writing of a school history which are tasks with a definite objective. In regard to school archives, however, it is very important to establish that the collection and maintenance of archives is an on-going process'.
- 8 Because they were made from straw, boaters were commonly known as "donkey's breakfasts" by Barker boys in the 1940s.
- 9 This is not meant to imply that school archivists undertake conservation for which they are untrained. It merely means that they undertake *preventive conservation* to minimise the deterioration of items. This can take the forms of 'building maintenance, environmental monitoring, integrated pest management, conservation-grade display and storage and disaster preparedness'. For further reading refer to Peta Landman (coordinating ed.), *Museum Methods: a practical manual for managing small museums and galleries*, Museums Australia, second edition, 2002, chapter 4, Preventive Conservation.
- 10 Luciana Duranti, 'The Odyssey of a Records Manager', Part II, *ARMA Quarterly*, October 1989.
- 11 This figure was calculated using the number of schools who were Institutional members of the Australian Society of Archivists plus those schools who employed ASA personal members, but were not institutional members.

- 12 Cook, Chapter 2.16e
- 13 Cook, Chapter 2.14.
- 14 Cook, Chapter 4.29.
- 15 Piggott, 'universal appraisal truism no.7'.
- 16 The Friends School Archives: 'The Archives are the keeping place of our School story. This story does not just belong to us, it belonged to our forefathers and it will belong to our descendants. It is not our property to do with as we like, we are trustees for those who come after us' – for further reading, see www.friends.tas.edu.au/aboutus/archives.
- 17 Dr G E Sherrington, *School Archives: Proceedings of a Seminar held on 15th September 1979*, page 8.
- 18 Dr Susan Emilsen, *The Lily and the Lion: a history of Abbotsleigh*, Richard Smart Publishing, Abbotsleigh, 2000, p.xi.