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The Sudden Impact of a Senator’s Death: Managing the Unexpected

Valerie Nye

BACKGROUND

Paul D. Coverdell began his career in politics in 1970 when he was elected to Georgia’s State Senate. After nearly twenty years of service in the Georgia Senate, he resigned from office to accept the position of director of the Peace Corps in the administration of President George H. W. Bush. Coverdell held this position until 1991, when he stepped down in order to campaign for a United States Senate seat which he won in 1992 and again in 1998.

A relationship between Georgia College & State University (GC&SU) and Senator Coverdell began in August 1990 when GC&SU President Ed Speir, a former Peace Corps volunteer, launched the first University Fellows Program in a rural school system at GC&SU. Under Coverdell's leadership at the Peace Corps, the University Fellows Program allowed returning Peace Corps volunteers to earn master's degrees at institutions like GC&SU while teaching in rural middle-Georgia schools.

The relationship between Senator Coverdell and GC&SU was solidified when Coverdell donated twenty cubic feet of his
Peace Corps papers to Special Collections in 1996, indicating that he was impressed with GC&SU’s mission as a public liberal arts university and had confidence in Special Collections’ records management system. While GC&SU had not collected nationally significant papers up until this point, the university’s administration was interested in expanding Special Collections’ mission by acquiring political papers.

Senator Coverdell’s interest in GC&SU continued after his initial donation. The relationship allowed GC&SU to speak with the senator about his United States Senate papers. After a period of discussion and negotiation, a gift agreement was signed at a ceremony hosted by GC&SU in March 1999. Once the agreement was signed, Special Collections and Senator Coverdell’s office began working together to ensure that historically important documents were sent to GC&SU in an organized manner from Coverdell’s Senate offices in Washington, DC, and Atlanta. On several occasions following the signing of the gift agreement, Special Collections staff met with Coverdell’s staff in charge of records management and the state director who oversaw all of the record transfers in order to discuss the types of documents his office was creating and the types of non-current documents that were to be sent to Special Collections. By July 2000 Special Collections had received approximately 150 cubic feet of United States Senate materials. A significant portion of the initial shipments included constituent mail, a series that after review Special Collections and Senator Coverdell’s office agreed would not be permanently collected.

**Senator Coverdell’s Unexpected Death and Special Collections’ Response**

Senator Coverdell was visiting his home in Atlanta on the weekend of July 15, 2000, when he suffered a cerebral hemorrhage. He underwent surgery at Piedmont Hospital in Atlanta and died on July 18. His death was a shock to Coverdell’s family, friends, and staff members, who believed he was in good health prior to the cerebral hemorrhage and who were all expecting him to return to work immediately following his recovery.

Archivists and Senate staff began working together on a very short timeline, beginning the day of Senator Coverdell’s death. According to Senate rules, when a United States senator
dies in office the office staff remains in control of the whole office suite for only fifteen days. After fifteen days, half of the suite must be turned over to the new senator. Twenty-six days after a senator's death the Senate staff can occupy only twenty-five percent of the office suite, and after sixty days the entire suite must be vacated. Senators have additional storage available to them in the Senate buildings in Washington, DC, as well as off-site through the Federal Records Center in Suitland, Maryland. All of these storage units must be vacated within ninety days of a senator's death. Due in part to the methodical archiving and record keeping done by Coverdell's staff and the willingness of his successor, Senator Zell Miller, to keep the offices clear of his new staff for nearly sixty days, the packing and transfer of materials to the GC&SU archives was a relatively smooth process. A timeline of events that occurred following Senator Coverdell's death can be found in Appendix 1.

The GC&SU staff learned of Senator Coverdell's illness and death through media reports the day following his death. On the advice of Senate Archivist Karen Paul, Special Collections decided not to communicate with Coverdell's Senate staff during the next week, as the offices were very busy making preparations for a memorial service. Karen Paul contacted members of the Senate staff on Special Collections' behalf to begin the initial communication and preparation. Since Special Collections could not work directly with the Senate staff immediately, the archivists at GC&SU began making plans and arrangements that did not directly involve the senator's offices.

Staff members in Special Collections began collecting materials and documenting events related to Coverdell's death and memorials. The college television station taped C-SPAN broadcasts that included speeches given by senators in honor of Coverdell's service to the United States. Library staff also collected obituaries from local news outlets, articles in national newspapers, memorials on Internet sites, and printed congressional notes from the Internet that contained memorials to the senator. These items would eventually become part of GC&SU's Coverdell collection. While Senator Coverdell's offices collected some materials of this nature, the materials collected by GC&SU were generally unique additions to the collection.

The GC&SU library staff also created a memorial of flower arrangements, photographs, and flags for the senator in
the lobby of the library. Handouts were available at the memorial table that provided a brief history of Senator Coverdell’s political career and included the memorials read by senators on the Senate floor. The university administration and library staff participated in numerous radio, television, and newspaper interviews the week of Coverdell’s death. The memorial exhibit served as a centerpiece for newspaper photographs and a backdrop for television interviews.

Because the media was interested in the story of how Senator Coverdell’s papers arrived at GC&SU, it was important for library staff and the university’s administration to present uniform information for all media inquiries. Remaining in regular contact with each other about decisions regarding the collection was extremely important, not only from the media relations perspective but also for everyone involved in the acquisition process who needed to answer telephone calls and act on important decisions.

The web pages devoted to Senator Coverdell on the GC&SU library’s site were updated the day following his death to reflect his accomplishments, the events leading up to his death, and his generous donations to GC&SU. These web pages served as an online memorial and were an important timesaving device for library and Special Collections staff who received frequent calls from the media in the next several months. Few members of the media who came to the campus to interview staff were familiar with the details of Senator Coverdell’s accomplishments, and the web page provided them with background information with which to conduct interviews.

Staff archivists also began making a series of telephone calls to archivists familiar with Senate papers and posted email requests for help on the Archives Listserv in an effort to understand the responsibilities the library would have as the Senate staff began closing Coverdell’s offices. Several archivists estimated that Senate offices generally create one hundred cubic feet of materials annually. With this estimate Special Collections began to plan for the transfer of 800 cubic feet of material. GC&SU eventually received a little less than 300 cubic feet of material, due in part to Special Collections’ and the Senate staff’s decision to destroy issue mail. However, planning for approximately 800 cubic feet gave Special Collections staff a benchmark in the search for storage space.
With this estimated volume of materials, Special Collections archivists and the GC&SU library director began investigating storage options for the incoming collection. Special Collections had agreed to accept Senator Coverdell's papers, knowing that the new library, due to be completed by 2004, would provide ample room for them. At the time of Coverdell's death, however, the Special Collections' stacks area was filled beyond capacity, and it quickly became obvious that alternate storage had to be located.

Staff began looking for secure and easily accessible storage space both on- and off-campus. Archivists made telephone calls to temperature-controlled, video-monitored storage units in Atlanta, Macon, and Milledgeville. While environmental controls in the off-site storage locations would be nearly ideal, off-site storage was expensive and would make it very difficult for Special Collections staff to inventory and begin processing the collection. After weighing the pros and cons of off-site storage and notifying the university's administration of the archivists' concerns, the administration decided that finding room on campus was a priority. Storage space was eventually located on the first floor of a secure dormitory building that had been condemned for daily human occupation. Plumbing in the upper floors had been turned off and the building was free of pests. The wing in which the collection was to be stored was dusted and cleaned, and air conditioners were installed in the rooms that would house materials. While the space was not ideal, on-campus storage would allow staff to access the collection and begin processing the records within months of their arrival.

While Special Collections was preparing for the arrival of the Coverdell papers, Senator Coverdell’s staff and family arranged a series of memorials and services in his honor. Several members of the library staff attended the public memorial service in Atlanta four days after the senator’s death. The eulogies during the memorial service helped bring a certain life to the records that had not previously existed. Archivists began processing the Senate collection in the summer of 2000 with the belief that there could be an infinite number of papers, clippings, and photographs. The memorial service was a sad reminder that the once-seemingly-endless collection of papers now had a sudden, unexpected, and finite end. The words of his friends and colleagues gave important insight into Senator
Coverdell’s personality, the way he organized his life, and the things he cared about most deeply. The personal information gained during the memorial services was eventually helpful when making personal connections with his Senate office staff during their time of mourning, and it allowed processing archivists to view the collection within the context of Paul D. Coverdell’s full life.

The second week following Coverdell’s death, Special Collections staff spoke briefly to members of the Senate office staff in Washington, DC. Special Collections archivists were relieved to make contact and begin dealing with what seemed to be a monumental task. In the early days of communication with the Senate office, archivists were trying to determine what the offices needed in order to facilitate the transfer of materials. During these conversations, archivists were also trying to pinpoint the primary staff members in charge of the offices’ actions. While most Senate offices in Washington, DC, are run by the senator’s chief of staff, archivists learned within the week that many of the traditional chief-of-staff duties were being handled by the senator’s state director. Special Collections learned from Senator Coverdell’s wife that the state director would be responsible for closing both the Washington, DC, and Atlanta offices. The state director and Special Collections staff worked closely in the months that followed with daily phone conversations, emails, and face-to-face meetings.

Senate Archivist Karen Paul, who served as an important liaison between Special Collections and the Senate office, facilitated the early conversations. She was able to discuss the office records and archival issues using language familiar to both the Senate office and the archivists. She also shared her thorough knowledge of the types of records found in Senate offices and was able to help the Special Collections archivists identify which documents would be of historical value and which should be destroyed before they were moved to the GC&SU campus.

In these early conversations with the Washington, DC, staff, archivists gathered important information about the electronic records stored in the senator’s offices. The first conversation with Coverdell’s office was with the staff member responsible for records management in Washington, DC. In this initial conversation, the staff member decided that he would have
all of the staff members print emails and memos in electronic form, and this would be the responsibility of each individual staff member. The staff member managing the records also communicated with the Senate staff on Special Collections' behalf, reminding them that the papers in their files were the property of the senator and could not be taken with them as they packed and moved on to new jobs. While staff dutifully packed files in boxes, in the end very few staff email records were printed and sent to GC&SU.

Special Collections staff members also began speaking frequently with members of the Atlanta office. In one of the initial conversations, Special Collections staff decided to transport packed boxes from Atlanta to Special Collections themselves to help alleviate the space pressures the Atlanta staff was feeling as Senator Miller moved into the space. The six trips Special Collections staff made to Atlanta for boxes helped provide additional space for the Senate staff members as they continued to pack office materials, and they allowed for a large number of fragile items to be safely conveyed to Special Collections. The trips to Atlanta also gave archivists the ability to assess the progress of the office closing first hand and to make continually changing notes about the volume of materials that would eventually arrive on the GC&SU campus.

WASHINGTON, D.C. VISIT

Throughout the next several weeks, the archivists and the senator's state director spoke almost daily by phone. The state director expressed a desire to have an archivist from GC&SU visit Washington, DC, in order to make some final decisions about the materials in the office and storage units. The GC&SU library director was able to secure library funding for travel expenses, and an archivist from Special Collections made preparations for the trip.

Before the archivist left for Washington, DC, Special Collections staff contacted the Senate Computer Center, the office responsible for the transfer of electronic records from Coverdell's office to Special Collections. Senate Computer Center employees had investigated the specifics of Senator Coverdell's computer system and were able to communicate accurately about the system. Of greatest concern was the constituent database called Quorum, created by ACS Desktop Solutions, a private
company. The database contained a log of the nearly 2,000 pieces of mail received weekly by the Coverdell office, archives of form letter responses sent to constituents, nearly half-a-million names and addresses, and Senator Coverdell's daily schedule. In considering the electronic database, the archivists realized there was a potential research value in the ability to run reports on constituent demographics and concerns. With the help of the systems librarian at GC&SU and the Senate Computer Center staff, it was decided that Special Collections would receive the database in an ASCII format. Since the software for the database was not available for GC&SU to purchase, Special Collections learned that it would be necessary to construct its own software around the information in ASCII format. While making the decision to accession the electronic database, the archivists and the systems librarian also realized that the possibility of recreating software and continually migrating the database would be difficult, very expensive, and maybe impossible. In the likelihood that it would not be possible to reconstruct the software, the archivists discussed the possibility of having reports run on key fields within the database in order to have a record of correspondence. The hard copy reports were run and eventually transferred to the archives, but to date the software has not been recreated and electronic data has not been migrated.

The third week following Senator Coverdell's death, GC&SU sent an archivist to Washington, DC, to assist the Senate staff with the office closing. The archivist helped the staff make decisions about records and pack remaining records. Because Coverdell's key staff members were still in the office at the time of the archivist's visit, she interviewed them individually, making notes about the records each section of the office created. The archivist interviewed the executive assistant to the senator, the senior policy advisor, several legislative assistants, the director of legislative correspondence, the deputy press secretary, the projects director, and the state director. The interviews and the visit to Washington, DC, allowed the archivist to evaluate the records of historic value while the filing systems were still intact. By talking to staff members about their jobs, it was possible to ascertain where specific sets of files were located and how they might be interfiled with other types of documents typically found in Senate offices. During the interview
process, the archivist was also able to correct misunderstand­
ings the staff had about the importance of the records they
created while working for the senator. Many staff members
believed that Special Collections was only interested in papers
Senator Coverdell had worked with directly, while many of the
records handled only by his staff members were also of archi­
val importance. Through personal interviews, the archivist was
able to stress the importance of all of the records created by the
Senate office, whether Senator Coverdell had dealt with them
or not. During these interviews staff members shared stories
about the senator and spoke about his working habits. Notes
from the interviews were later compiled and will be invaluable
as the collection is processed and exhibits and displays are
planned.

During the four-day visit, Senate staff members and the
archivist inspected and assessed records in the storage unit in
the Russell Senate Building, at which time materials to be de­
stroyed were identified. At the time of his death, Coverdell had
materials stored off-site in the Washington National Records
Center and in the Russell Senate Building attic. While a trip to
these facilities was not possible, the archivist was able to dis­
cuss the details of the material with the staff member who would
be making the final “save or destroy” decisions. By identifying
records for destruction, the Senate office was able to arrange
for their destruction in Washington, DC, saving GC&SU con­
siderable time and money.

The visit to Washington, DC, also allowed the archivist
to see the Senate office database in operation and to make deci­
sions about collecting information. For instance, through con­
versations with Senate office staff, it was discovered that there
was confidential information recorded in the senator’s electronic
schedule. Due to the existence of confidential information in
the database, the archivist requested that Special Collections
receive two copies of the senator’s electronic schedule. One set
of copies contains a confidential notes field that is sealed for
twenty-five years, and one set does not contain the notes field
and will be open for research as soon as the collection is pro­
cessed.

The archivist worked with ACS Desktop Solutions, the
creator of the Quorum database, and Coverdell’s state director
in order to determine which hardcopy reports should be run
from the electronic database of correspondence. It was decided that reports would be run according to the issue discussed in the correspondence, the issue to which the office responded, the date of the correspondence, the name of the correspondent, and the address from which the correspondence originated. ACS Desktop Solutions ran the reports, producing thousands of pages of data that were included in the final shipment of records to the GC&SU campus.

In the final days of the Washington, DC, visit, the archivist worked with several of the staff members labeling and dating a large number of photographs found in Coverdell’s personal office. The archivist also worked to pack some of the more delicate items that were to be shipped to GC&SU. Packing up the mementos was a difficult process for the Senate staff because many of the mementos were items that Coverdell had personally collected. While many of the mementos would not normally be something an archives would collect, due to the emotional circumstances Special Collections decided to let the Senate staff members decide which ones were important and should be sent to the archives. While the gift agreement with Senator Coverdell allows for GC&SU to dispose of items after his family is notified, Special Collections does not anticipate deaccessioning any memorabilia since it will be used in museum displays devoted to Senator Coverdell and Georgia politics. A full list of materials retained and destroyed can be found in Appendix 2.

GETTING THE MATERIALS FROM THE SENATE OFFICES TO GC&SU

The expenses for moving Senator Coverdell’s papers from Washington, DC, to the GC&SU campus were covered by the Senate office’s budget. The Senate office originally discussed the possibility of using Senate franking services to move the materials from Washington, DC, to Georgia, but discovered that contracting with a moving company would be less expensive. Coverdell’s staff made all of the arrangements with the moving company, and the lowest bid for the job was accepted.

During the time the Senate office was preparing the materials for shipment, GC&SU archivists, administrators, and facilities maintenance staff made final arrangements for the collection’s arrival by verifying that the storage rooms had been cleaned and air conditioned and that the street in front of the
building could be blocked in order to park the moving truck upon its arrival. The plan was to park the truck in the street as close to the storage building as possible. The archivists planned to have the moving company use dollies and hand trucks to move the materials from the truck to the new location. As the collection moved closer to Milledgeville, however, all of these plans would change. At the time the collection left Washington, DC, the only thing certain was that approximately 280 cubic feet of archival materials were on the way to Special Collections.

Once the shipment was on the truck, the archivists quickly realized that the burden of the move had shifted from the Senate office staff to the Special Collections staff. With the collection in transit, archivists in Special Collections began communicating directly with the shipping company manager. Unfortunately, much of the information archivists had gathered from the Senate staff began to conflict with the moving company's understanding of the shipping contract. For example, Special Collections archivists understood that the boxes would be unloaded from the truck and moved into the building by the moving company. According to the shipping company manager, the contract did not require the moving company to off-load the truck. The archivists also learned from the moving company that the collection was on pallets and shrink-wrapped in plastic, creating a need for a forklift when unloading. On the day of the shipment's arrival, archivists learned that the truck did not have a lowering gate and would have to be unloaded at a building with a loading dock. Since there was not a dock on the collection's storage building, the shipment was directed across the campus to the central receiving building at the last minute.

The shipment arrived on the evening of September 28, 2000, amid news reporters, photographers, and university spokespersons. The moving truck had been loaded beyond its weight capacity and had experienced numerous engine and tire problems due to the collection's five-ton weight. Despite the travel delays and conflicting information, the collection arrived safely and completely. The library director and maintenance staff worked late into the evening in order to secure the collection in its final campus location. Based on GC&SU's experi-
ence, a checklist for moving records has been provided in Appendix 3.

**The Collection in Review**

After the collection arrived and was placed in storage, archivists reviewed all of the materials and made specific notes about the collection, using information gathered in Washington, DC. Notes listing the creators of the documents, the specific document types, and the workflow associated with the materials were attached to boxes. The archivist who traveled to Washington, DC, also made notes for the processors about the unorganized portions of the collection, noting the origin of materials that appeared to be intermingled. During the review, the archivist also verified that all database reports from ACS Desktop Solutions were included in the shipment. The information gathered from the review was used to create a detailed processing plan for the collection.

As of this date minimal processing has been completed due to staff turnover and delays in the construction of the new library building. In 2003 GC&SU received a Fund for the Improvement of Postsecondary Education (FIPSE) grant that will finance the two-year project archivist’s position responsible for processing the Coverdell collection. The project archivist will be hired in late 2004 or early 2005.

**Important Resources**

Karen Paul, the Senate archivist, was extremely helpful in facilitating conversations between Special Collections and Senator Coverdell’s office. Special Collections staff was able to communicate candidly with her in the days immediately following the senator’s death. Her comments, suggestions, and guidance allowed archivists to accurately assess the volume and historic value of the papers created by Senator Coverdell’s work. She was able to impress upon the archivists the importance of working efficiently during the office closure while working in a sensitive manner in the midst of grieving friends and staff members.

*The Records Management Handbook for United States Senators and Their Archival Repositories* by Karen Paul and *Congressional Papers* by Faye Phillips were invaluable resources. Archivists put the information in these books to use by creating
lists of materials Special Collections wanted from Coverdell’s offices, materials Special Collections wanted the Senate office to destroy, and materials that would be of special concern because they were only available in electronic formats. Using these sources, archivists made crucial decisions concerning the destruction of materials. By having the Senate office destroy unwanted materials, Special Collections did not have to contend with hundreds of boxes of confidential papers that would have been very difficult and expensive to adequately destroy.

Cynthia Pease Miller, then the archivist for Senator Daniel Patrick Moynihan, was also very helpful during the process of closing the offices. The library director and one of the Special Collections archivists had taken the Acquisition, Processing, and Reference of Legislative Collections Workshop, a course team-taught by Miller and Herb Hartsook in Atlanta in 1998. This course had given the staff a foundation for understanding the scope and content of the Senate papers, and Miller’s encouragement and insights during the office closings were much appreciated.

From the archivists’ perspectives, Senator Coverdell’s foresight regarding the disposition of his papers made for a fairly smooth transfer of records. Having a signed gift agreement eliminated all legal issues concerning collection ownership and allowed archivists to begin preparing for the arrival of the collection the day following Coverdell’s death. The efficient records management system in place within the Senate offices made the identification of records relatively easy. Senator Coverdell’s staff was also very helpful in organizing the final closing efforts, despite the death, the loss of their jobs, and their search for new employment. They communicated frequently with Special Collections about the issues and concerns with which they were dealing. Due to the years of planning and immediate efforts of all the people involved in the office closings, the process was organized, took place within the required time limit, and was relatively free of surprises. The organized movement of the senator’s papers into GC&SU’s Special Collections will allow archivists to analyze and process the collection efficiently. Having Senator Coverdell’s papers available to students and scholars will be Senator Coverdell’s lasting legacy to the citizens of the state of Georgia.
Valerie Nye is a library consultant at the New Mexico State Library. Before moving to New Mexico she worked as an archivist in Georgia College & State University’s Special Collections where she began processing Senator Coverdell’s United States Senate papers. She holds an MLS with an emphasis in archival administration from the University of Wisconsin—Madison.

Appendix 1:

**Chronology, July 18, 2000—Senator Coverdell’s Death**

**Day 1 (July 19)**
- Added page to GC&SU website as a memorial
- Created memorial at library entrance
- Fielded a few media calls
- Printed Senate office’s web pages before any changes were made announcing his death
- Printed and clipped death notices
- Taped C-SPAN events

**Day 2**
- Attempted to contact staff in Atlanta office to offer condolences, without success
- Began to look for funding, in case a trip to Washington, DC, would be necessary
- Called Karen Paul, senate archivist
- Library staff interviewed by media arriving on campus
- Printed “Congressional Notes” from previous day
- Started looking for storage
- Talked to archivists familiar with Senate papers

**Day 3**
- Began background reading on Senate papers and electronic records
- Continued to search for storage

**Day 4**
- Library staff attended Atlanta funeral

**Day 6**
- Made first contact with Senate staff and talked with Washington, DC, office records manager
- Washington, DC, staff began investigating shipping options

**Day 7**
- Talked with Atlanta office and state director and began discussing transportation of material

**Day 9**
- Met with state director in Atlanta to discuss staff needs in Atlanta and Washington, DC
- Took 25 cubic feet of memorabilia from Atlanta to Special Collections
Appendix 1, continued:

Day 13
- State director requested that a Special Collections archivist come to Washington, DC

Day 14
- Began conversations with the Senate Computer Center about electronic records
- Continued search for storage

Week 3
- Archivist traveled to Washington, DC, met with Senate staff, visited the Senate Computer Center

Week 4
- Traveled to Atlanta to collect fragile memorabilia

Week 5
- Secured storage on campus
- Boxes left Washington, DC, and Atlanta and arrived at GC&SU

Weeks 6 & 7
- Reviewed materials and developed a written processing plan

Appendix 2:

Records Retained by Special Collections:

Personal/Political/Official Records:
- Daily Schedule without Confidential Information—printed
- Daily Schedule with Confidential Information—printed
- Daily Schedule with All Information—electronic
- Diaries/Journals
- Invitations—accepted
- Memos from the Senator
- Memorabilia Deemed Important by Staff
  - Framed Photographs and Awards
  - Three-Dimensional Awards, Gifts, and Mementos from Travel
- Videos
- Personal Correspondence
- Photographs
- Service Academy Appointments—recommended
- Speeches
- Website—printed

Legislative Records:
- Legislative Assistants Files
- Memos
- Recommendations
Appendix 2, continued:

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<th>Reports</th>
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<td>Research Materials</td>
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<td>Senior Policy Advisor Materials</td>
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<td>Voting Records</td>
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<td>Hard Copy Reports Run from LEGIS</td>
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Constituent Service Records:
- Correspondence Management System Database—electronic
- Reports from the Correspondence Management System Database
  - Report on Issue Discussed in Letter
  - Report on Issue Addressed by Office
  - Report on Dates of Correspondence
  - Report on Names on Correspondence
  - Report on Address of Origin of Correspondence

Press Relations/Media Activities Records:
- Clippings
- Mailings
- Press Releases
- Videos

Office Administration Records:
- Chief of Staff Files
- Job Descriptions
- Lists of Staff Members
- Policies and Procedures
- Office Director's Files
- Staff Meeting Agendas and Minutes

Records Not Retained by Special Collections:

Personal/Political/Official Records:
- Invitations—declined
- Memorabilia Deemed Less Important by Staff
- Website—electronic version

Constituent Service Records:
- Case Files
- Issue Mail
- Service Academy Appointments—not recommended
- Requests for Materials

Legislative Records:
- Electronic Versions of Email

Office Administration Records:
- Staff Personnel Records
Appendix 3:

**Checklist of Considerations When Arranging for the Physical Transfer of Materials**

- Determine who in the Senate office is in charge of arranging the move.
- List multiple ways of contacting the Senate office staff member responsible for the move.
- List multiple ways the Senate office can contact archives staff.
- Request that the Senate office arrange for both on-loading and off-loading the materials.
- Ask the Senate office to verify that the moving company has experience moving records, which are much heavier than items in a general office/household move.
- Determine when the papers are expected to leave the Senate offices, and verify that the moving company has received the records and is in transit on this date.
- Be prepared for many changes in the information you believe you have already verified.
- Obtain contact information for the moving company and the person driving the truck.
- Ask the moving company to estimate the day of arrival, but expect the shipment to arrive several days before or after that date.
- List multiple ways the moving company can contact you.
- If possible, maintain contact with the truck driver, rather than a dispatcher at the moving company.
- Talk to the driver about the following information, even if you believe you already know the answers:
  - What type of truck will the records be arriving on?
  - How will the boxes be packaged (wrapped on pallets, stacked on pallets, or as individual boxes)?
  - What kind of equipment will be needed at your facility to unload the records (fork lift, hand truck, etc)?
  - Does the contract with the Senate office include off-loading the material?
  - Does the truck have a ramp or will the boxes need to be unloaded onto a dock?
  - What is the estimated day and time of arrival?
- Maintain constant contact with the driver on the day of the shipment.
- If necessary, make plans to block parking spaces, close streets, and/or reroute sidewalks, allowing the collection to be moved safely from the truck to the storage building.
- If necessary, arrange to have people available to unload the truck when it arrives.
- Call your Senate office to report that the records have arrived.