

INVITATIONAL MEETING OF EXPERTS ON ARRANGEMENT FINAL REPORT

APPENDIX A RECOMMENDATIONS SORTED BY CATEGORIES

Information Gathering	Advisory	Exploratory
5) Survey archival institutions to determine whether guidelines (directed to archivists) for arranging personal, family, and organizational fonds have been developed and the nature of such guidelines.	1) Develop a matrix that (1) defines and characterizes the various processes associated with arrangement, e.g., physical control, administrative control, intellectual control; (2) explains the objectives and results of each of these processes; and (3) identifies the descriptive tools associated with each of them.	9) On the basis of recommendation 7 and 8, prepare a discussion document that investigates the feasibility and desirability of developing arrangement guidelines for creators of personal fonds and the various forms such guidelines might take in relation to both electronic and non-electronic records.
7) Survey existing institutional practices to ascertain the extent to which archivists are already providing guidance to personal record creators concerning the arrangement of their records and the nature of that guidance (see also rec. 9)	2) Elaborate on the elements that are or should be included in the descriptive tools identified in the matrix proposed in Recommendation 1.	
8) Prepare a literature review of the empirical research done to date in the area of personal information management (PIM).	3) Prepare a discussion document that clarifies and elaborates on the principles that “description follows arrangement,” and “description is based on arrangement.”	14) Include discussion of collections and discrete items in the guidelines proposed in recommendation 12 and 13.
15) Undertake a series of case studies aimed at examining arrangement in the specific context of electronic records. Such discussion should take into account issues of consortia and distributed networks, the difference between traditional files and computer files, and the boundaries of a file and an item in an electronic environment.	4) Prepare a discussion document(s) on the principles of respect des fonds and respect for original order that explains their original meaning, the intentions underlying them, their evolution over time, and their contemporary interpretation and application in light of the challenges posed by personal fonds.	17) Prepare a discussion document that examines the question of implementation in contributory networks and that identifies the means necessary to permit alternative approaches (i.e., both series and fonds based approaches) within those networks.
	6) Develop guidelines that will assist archivists in identifying when and if records have a discernible order and in the absence of any discernible order, provide examples of different kinds of arrangement that may be appropriate in a number of given situations.	

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	10) Prepare a discussion document that (1) explains the terms of analysis for identifying the external and internal structure of a body of records in the context of both organizational and personal records; and (2) elaborates on the inferential process underpinning that analysis.	
	11) Review the <i>Rules for Archival Description</i> to determine whether the descriptive elements currently included in the standard need to be revised in light of the analysis outlined in the discussion document proposed in recommendation 10.	
	12) Prepare general guidelines for identifying series, files and items that define each level, explain their interpretation and application in various contexts and that include examples and scenarios that provide criteria for recognizing series, files, and items and that indicate when it is appropriate to ignore one or more of the designated levels of arrangement.	
	13. On the basis of those general guidelines, prepare individual sets of guidelines for personal and non-textual records.	
	16) Prepare a discussion document that outlines the salient features of fonds- and series-based approaches to arrangement that lays out their points of convergence and divergence.	