

of large complex trusts or foundations that can afford trained records supervisors. If your operation is as complex as an insurance firm or an engineering organization, then professional file help should be consulted. This is not always expensive. Filing equipment vendors, commercial school teachers, and public librarians can give considerable guidance. We will concern ourselves with systems other than these two.

Alphabetical filing is almost self-explanatory. It consists of merely heading up the file folders and arranging them in alphabetical order. This is extremely simple, up to a point. It requires no separate index card setup and can be changed to a more sophisticated system rather easily at a later date. However, extensive cross filing and/or making of additional copies for various related files may be required.

The point at which it becomes more complicated occurs when the files become somewhat voluminous. Several manuals have been written on how to file alphabetically. A good reputable booklet on this subject should be purchased and made the basis of your system so that succeeding clerks won't inject their own ideas into this fairly simple system. This is especially true when you are dealing primarily with names of persons or business firms as opposed to academic subjects.

Numerical filing systems are used a great deal in legal firms, trusts and foundations and others. Such a system requires an alphabetical index card system which will refer you to a properly numbered file. The files are maintained in numerical order so that the final search for a file is relatively simple. One theory being that it is easier to rearrange index cards than it is to rearrange the files.

This system can be expanded indefinitely and makes for accurate and rapid filing.

Geographical filing is used primarily for trusts and foundations having extensive operations or widespread activity on a continuing basis throughout a large geographical area.

Each geographical location can and usually does have alphabetical or numerical sub-files. In your initial search you find the area in which you are interested and then the subject matter within that area. This system should also be used with a good index card system and possibly a rather extensive cross-index system.

In many trusts and foundations the various systems are usually combined when they have a sophisticated file system. There is a time and place for all of them. However, keep the system simple and accurate until experience dictates the appropriate route for you to follow.