



ARCHIVES BASICS FOR CHURCHES | SESSION 2

A short series on archives basics,
useful for congregations and dioceses of the Episcopal Church



WELCOME

- **Historical Society of the Episcopal Church**
 - Promote preservation
 - Publish
 - Cooperate

- **Series is Recorded**
 - hsec.us/da
 - Share with others
 - Review



SERIES OUTLINE

Five Sessions – hsec.us/da

- ~~Session 1 | Introduction and Orientation~~
 - ~~What is an archives? How organized? Roles of archives.~~
- **Session 2 | Policies and Practices**
 - Ownership. Confidentiality. Access/security. Thinning. Discarding. Loaning.
- **Session 3 | Organizing the Organization's Records**
 - Inventory. Organizational chart. Examples
- **Session 4 | Personal Papers**
 - Biography. Bibliography. Finding device. Legalities. Examples.
- **Session 5 | Operations and Administration**
 - “Canonical” status. Facilities. Forms. Undated items. Budget. Reporting.



ARCHIVAL WORK

- **Identify** what to keep
- **Preserve** what is kept
- **Share** what is kept with others



Diocese of Fond du Lac Archives



SERIES PRESENTERS



John Rawlinson

- Past Archivist, Diocese of California
- Archivist, Church Divinity School of the Pacific



Susan Stonesifer

- Archivist, Diocese of Washington
- Past President, National Episcopal Historians and Archivists



PARTICIPATION

- Hold **questions** until end
 - Write them down
 - Use Zoom comment feature
 - Email us (visit hsec.us/da)



Diocese of Olympia Archives



WHAT IS AN ARCHIVES?

1. An archives is the memory of an _____.



Kanuga Archives



WHAT IS AN ARCHIVES?

1. An archives is the memory of an **organization**.
2. The owner of the archives is the _____.



Kanuga Archives

WHAT IS AN ARCHIVES?

1. An archives is the memory of an organization.
2. The owner of the archives is the organization.



Kanuga Archives



OWNERSHIP OF THE ARCHIVES

- Ownership = control & **authority** over archives.
- Archivist **responsible** ONLY to owner.
- Non-owners may assert ownership and right of control.
 - donors
 - bishops
 - rector/vicar
 - warden/vestry
 - religious superior
- Archivist maintains control by following **policies**



Kanuga Archives



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POLICY: CONFIDENTIALITY

- Archives may contain **confidential** material.
 - work evaluations
 - disciplinary actions
 - public complaints
 - criminal matter
 - salaries
 - transcripts
 - candidate evaluations
 - psychological evaluations
 - Social Security numbers



POLICY: CONFIDENTIALITY

- Archivist must maintain **confidentiality**
- Need **trustworthy** volunteers
- Materials subject to **subpoenas**



POLICY: CONFIDENTIALITY

- Items available on “**need to know**” basis
- Materials might **protect** organization
- May be “sealed” by a donor under **conditions**
 - Mark conditions on material



POLICY: ACCESS

- Written policy, **approved** by owning authority
- **Limitations** on access
 - Need to access (staff vs. researcher)
 - Confidential (item / folder / box)
 - Non-confidential (item / folder / box)
- **Secured** facility
 - FEW persons with keys
 - Confidential – additional security (locked cabinet)

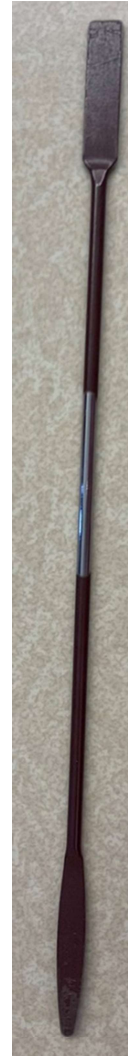


PRACTICE: PHYSICAL PROCESSING

- **remove ferrous metal**
 - paper clips
 - staples
 - prong holders
- **remove three-ring binders**
- **remove three-prong report “jackets”**
- **remove rubber bands**



Tools to Use



DEPARTMENT OF RELIGIOUS EDUCATION
DIOCESE OF FOND DU LAC

REPORT TO THE DIOCESAN COUNCIL
May 10, 1938.

"Our Church Schools have dropped in the Diocese from 2,048 in 1929 to 1,854 in 1937. Let us go home and do something about it."

These words spoken by our Bishop at the 1937 Council became the challenge of your Department of Religious Education. We felt that it was our duty to be of real help to the parishes in meeting this situation. We realized at once that no real progress could be made until the Department had representatives from every section within the Diocese. With the approval of the Executive Board, the Department was enlarged to include the chairman and 16 members: six priests, six laymen and five laywomen. The Department has held a

PRACTICE: PHYSICAL PROCESSING

- **Newsprint, acidity and aging**
- **Photocopy**
 - **100% rag bond / cotton paper**
 - **file copy (physical)**
 - **file copy (digital)**
 - **discard original**



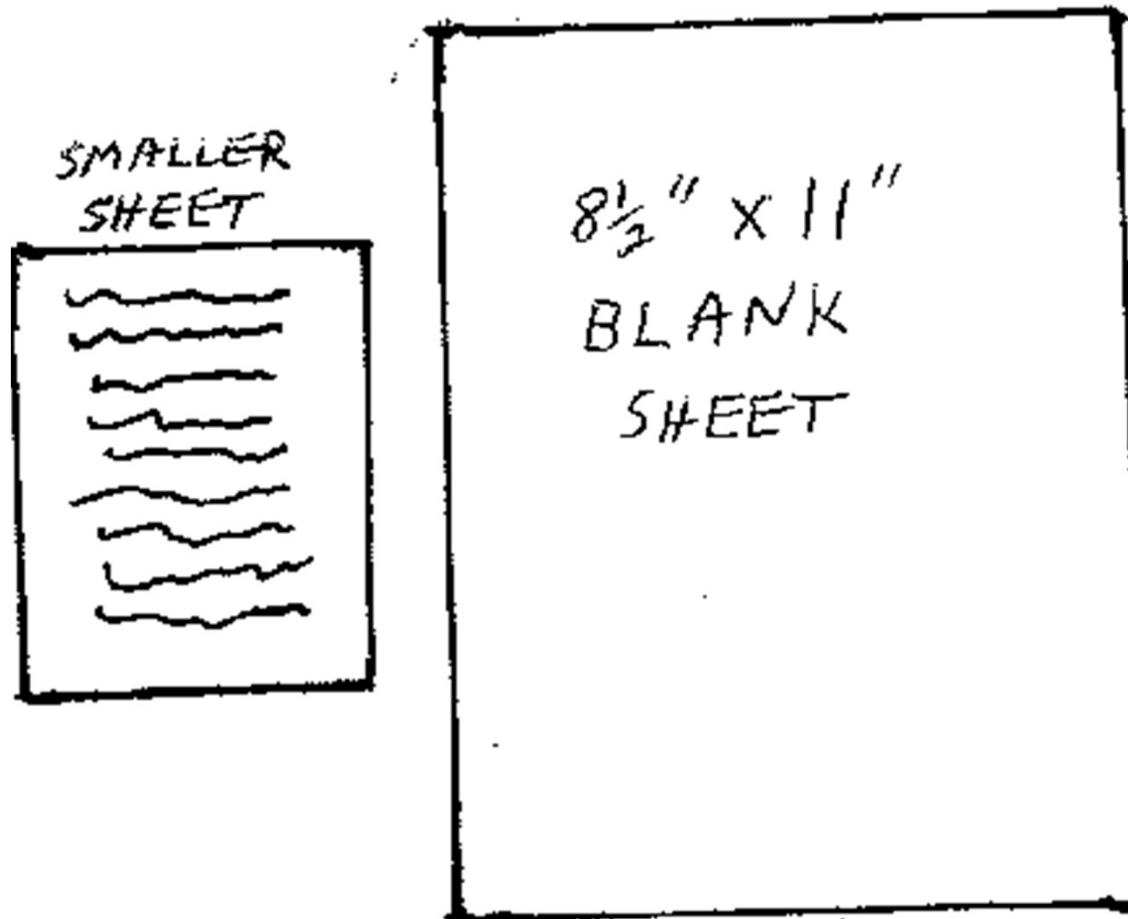
PRACTICE: PHYSICAL PROCESSING

- **NEVER glue**
 - Chemicals discolor
 - Ooze, effect other items
 - Long-term effects unknown
- **NEVER tape**
 - Removing can damage item
 - Do not remove existing tape, more damage
- **Copy instead of attempting major fix**



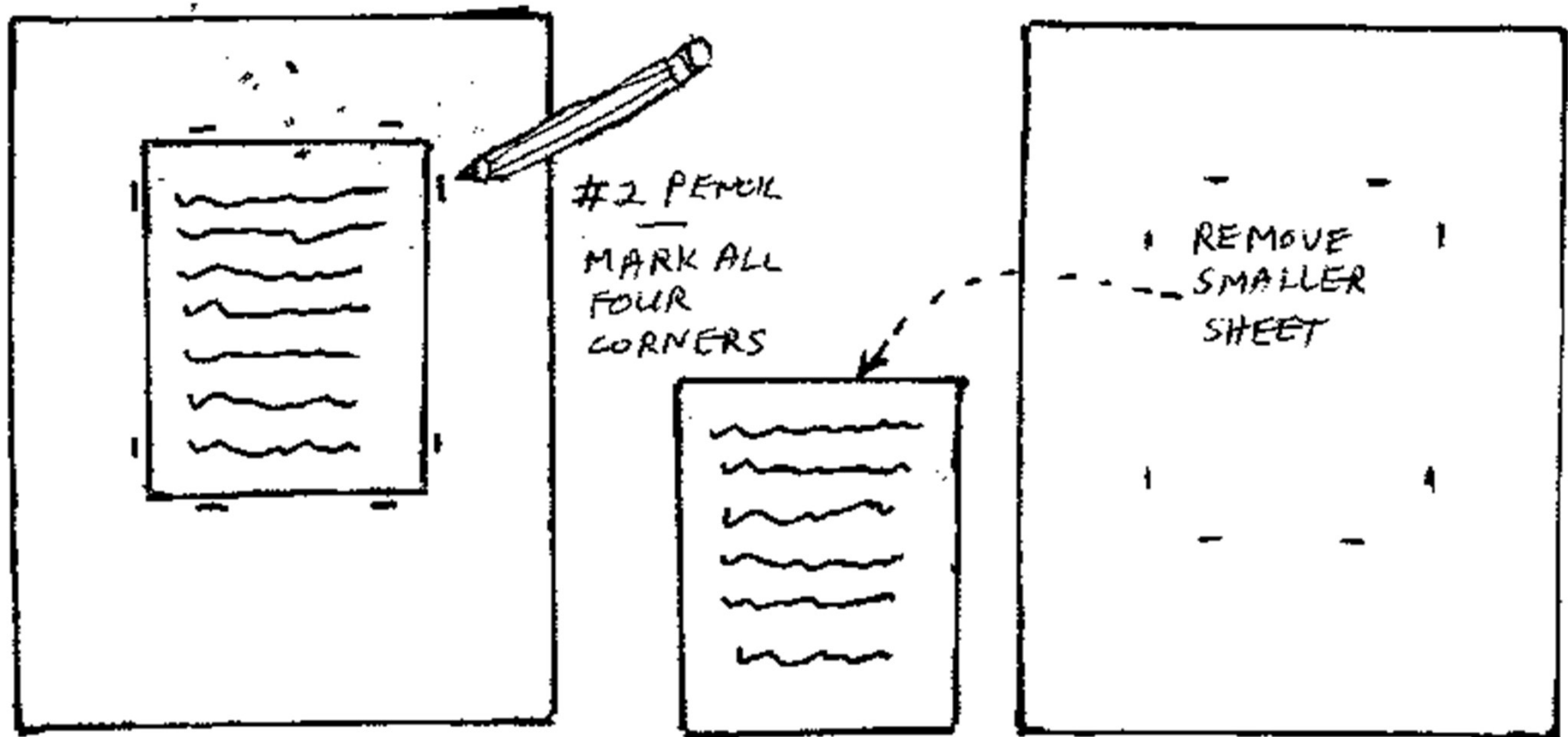
PRACTICE: PHYSICAL PROCESSING

- Securing smaller documents



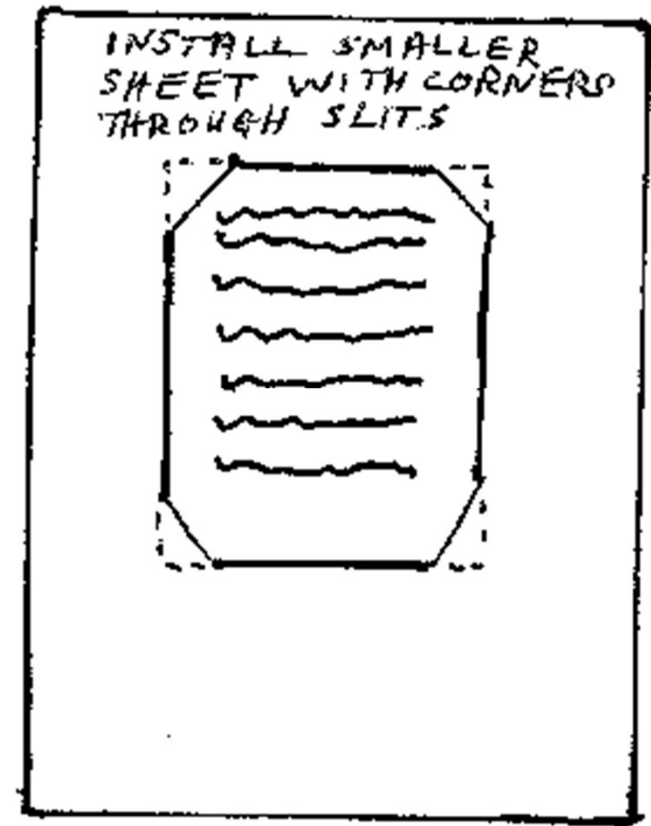
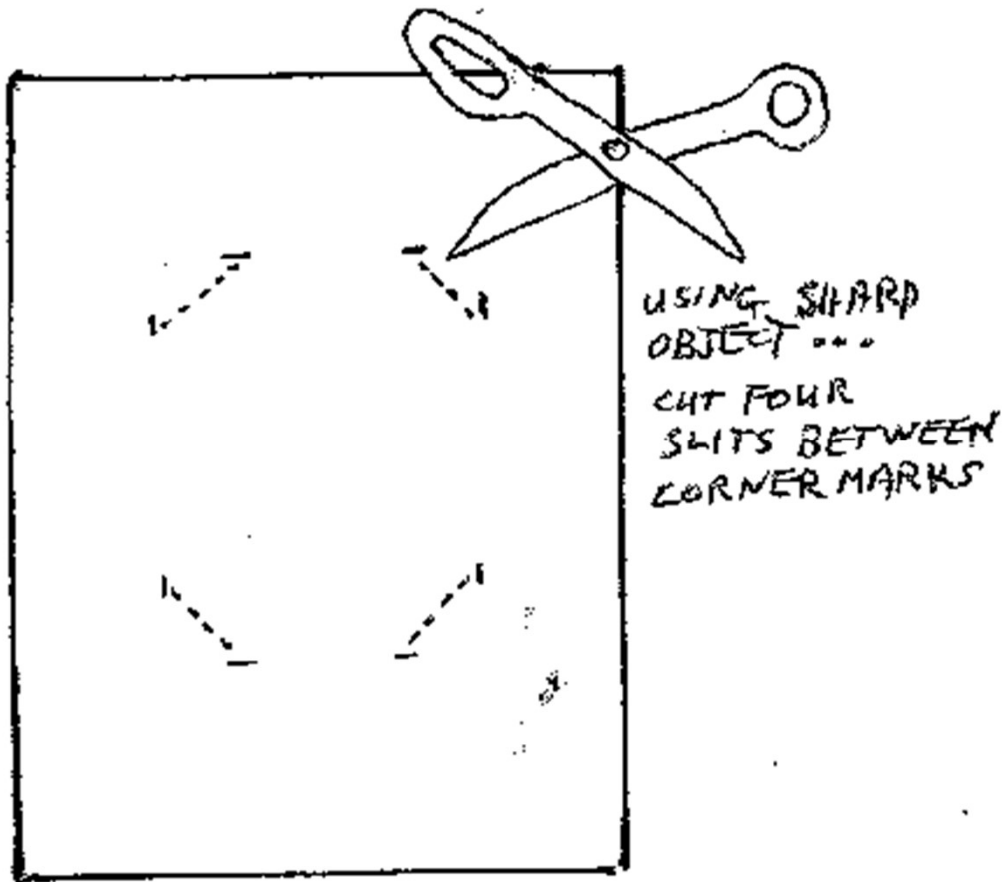
PRACTICE: PHYSICAL PROCESSING

- Securing smaller documents



PRACTICE: PHYSICAL PROCESSING

- Securing smaller documents



POLICY: RETENTION

Records Management for Congregations: An Archives Manual for Episcopal Parishes and Missions



General Records Retention Schedule for Congregations

The following retention schedule is provided as a *general* guide to the adoption of local standards. It covers most records, but is not tailored to the specific requirements of particular congregations. It is most useful as a standard by which a congregation can develop its own schedule with local input and expertise.

These definitions apply in the Records Schedule that follows:

P = permanent retention for purposes of indefinite legal, administrative or historical use

AU = retain the record for its current administrative use and destroy only after all use ceases

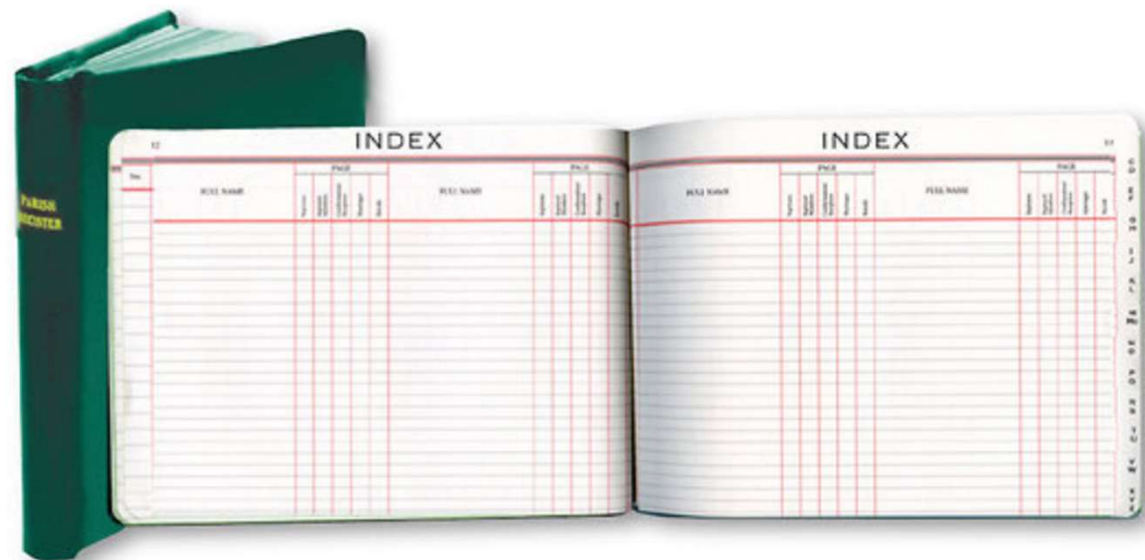
SR = selective retention of individual files after review: transfer permanent records to Parish Archives and destroy obsolete records.

Record Title or Series	Minimum Retention	Retention Recommendation
A		
Accounts Payable Files, Operational Accounts	7	Destroy after 7 years. <i>See also</i> Invoices and Paid Bills on Capital Expenses.
Act of Incorporation	P	Transfer to Parish Archives.
Agreements, Contractual		See Contracts.
Annual Financial Reports		See Financial Statements, Annual.



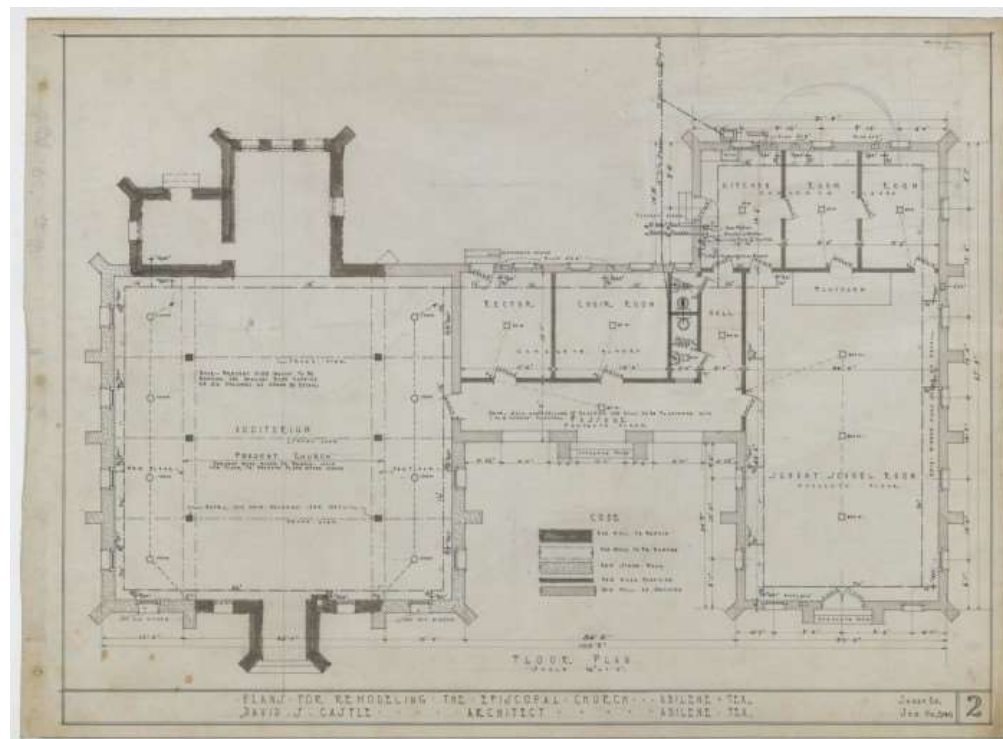
PRACTICE: RETENTION

- **Essential legal info**
(bylaws, incorporation papers, Church Registers)
- **Valuable items for congregational history**
(past church histories, membership directories, newsletters, bulletins)
- **Statistical data**
(parochial report, audit reports, annual financial statements, parish profiles)



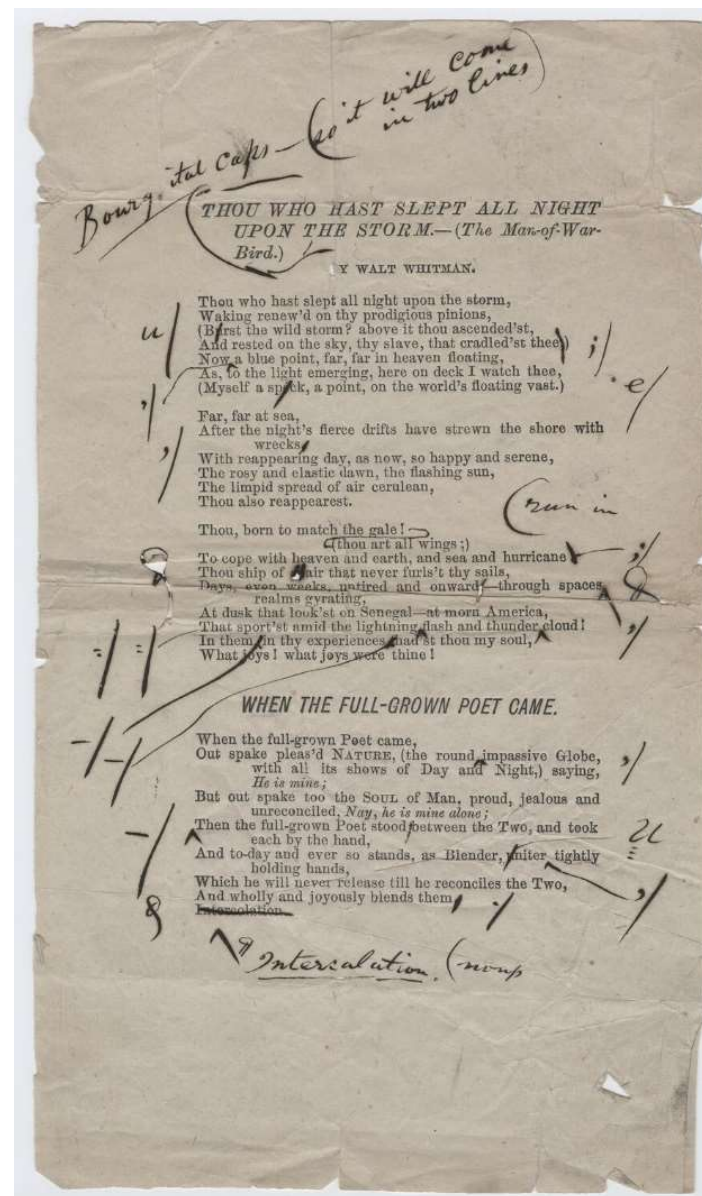
PRACTICE: RETENTION

- **Essential info – major organizations / projects**
(report to the annual meeting, flyers, brochures, membership lists, publications)
- **Essential data – buildings, grounds, other property**
(inventories, documents related to construction or alteration, architectural plans, deeds, permits, repair history)



PRACTICE: RETENTION

- Keep
 - earlier drafts of published works
 - important unpublished statements
 - position papers
 - studies



POLICY: THINNING

- **Substance more important than volume** (quantity)
- **Remove** (consider case-by-case)
 - **When readily available from other sources**
 - **When not integral to organization**
(e.g., dictionary, unrelated book)
 - **Newspaper/ journals EXCEPT “in house” publication**

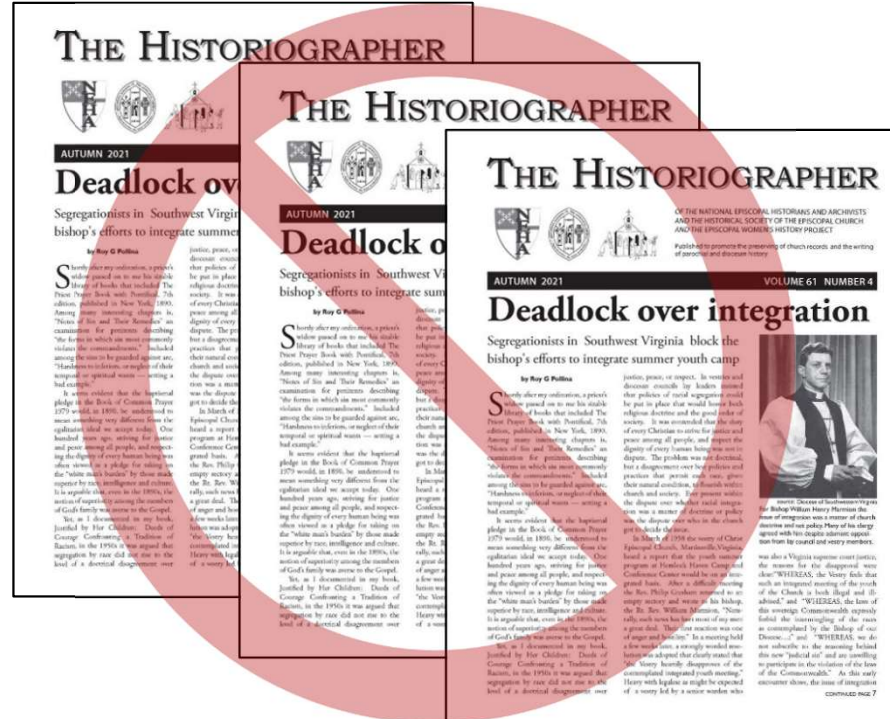


- **Combine “dead” & “active” files for single, continuous set**



PRACTICE: THINNING

- Keep original / best copy, dispose duplicates



- Keep copy when unique participant notation
- When in doubt, keep it (if only temporarily)



PRACTICE: THINNING

- **Discard / consider discarding**
 - **Administrative use materials** - receipts, cancelled checks, invoices paid, acknowledgements (e.g. hotel receipts, travel arrangements, etc.)
 - **Superseded materials** (e.g., tentative invitations)
 - **Unconnected notices, advertisements** (e.g. sales catalogues), **press releases, unless some unique notation**
 - **Negotiations/arrangements speaker/special visitors**
 - **Agendas EXCEPT when no minutes**



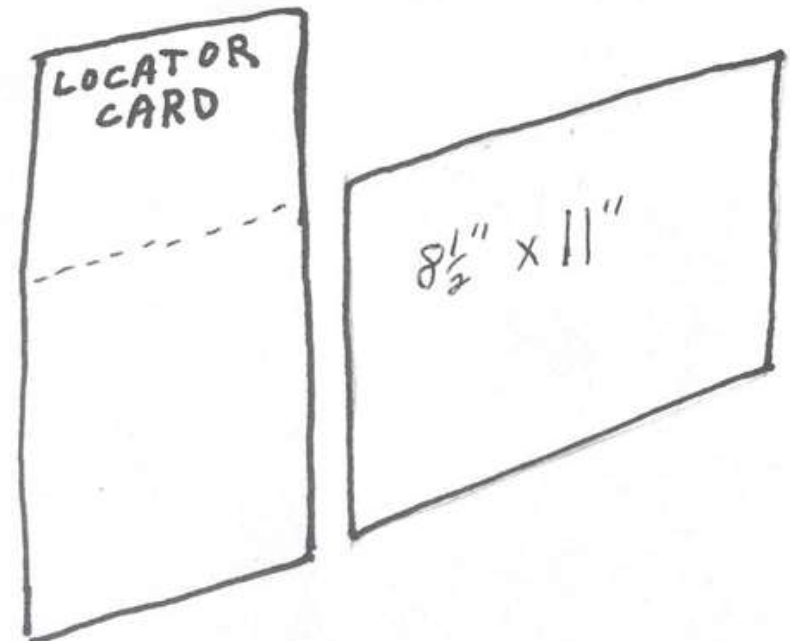
PRACTICE: DISPOSAL (DOES NOT MEAN THROW AWAY)

- **Offer relevant materials to archival or library institutions**
 - not if already clearly accessible, incomplete, partial
- **Share items with nostalgia value to members**
 - first-come-first-served
- **Shred data which could be misused**
 - confidential, SSN, bank account numbers, family information
- **Recycle non-confidential materials**



PRACTICE: MATERIAL USE

- **Authorized staff provide controlled access**
 - Follow written procedures / best practices
 - No off-site removal
- **Remove item only for authorized imaging**
 - Identify item (finding aid or index)
 - Locate item (physically)
 - Place locator card, remove item
 - Image item (copy/scan/phone)
 - Return item
 - Remove locator card



PRACTICE: IMAGING MATERIALS

- **Copy/Scan compared to Phone**
 - Fixed location / portable
 - Squaring simple / squaring difficult
 - Quality considerations
 - Flattening / “au natural”
 - Lighting considerations (balanced / fluctuate)
 - Digital storage
 - “Shake” factor
 - Format / OCR



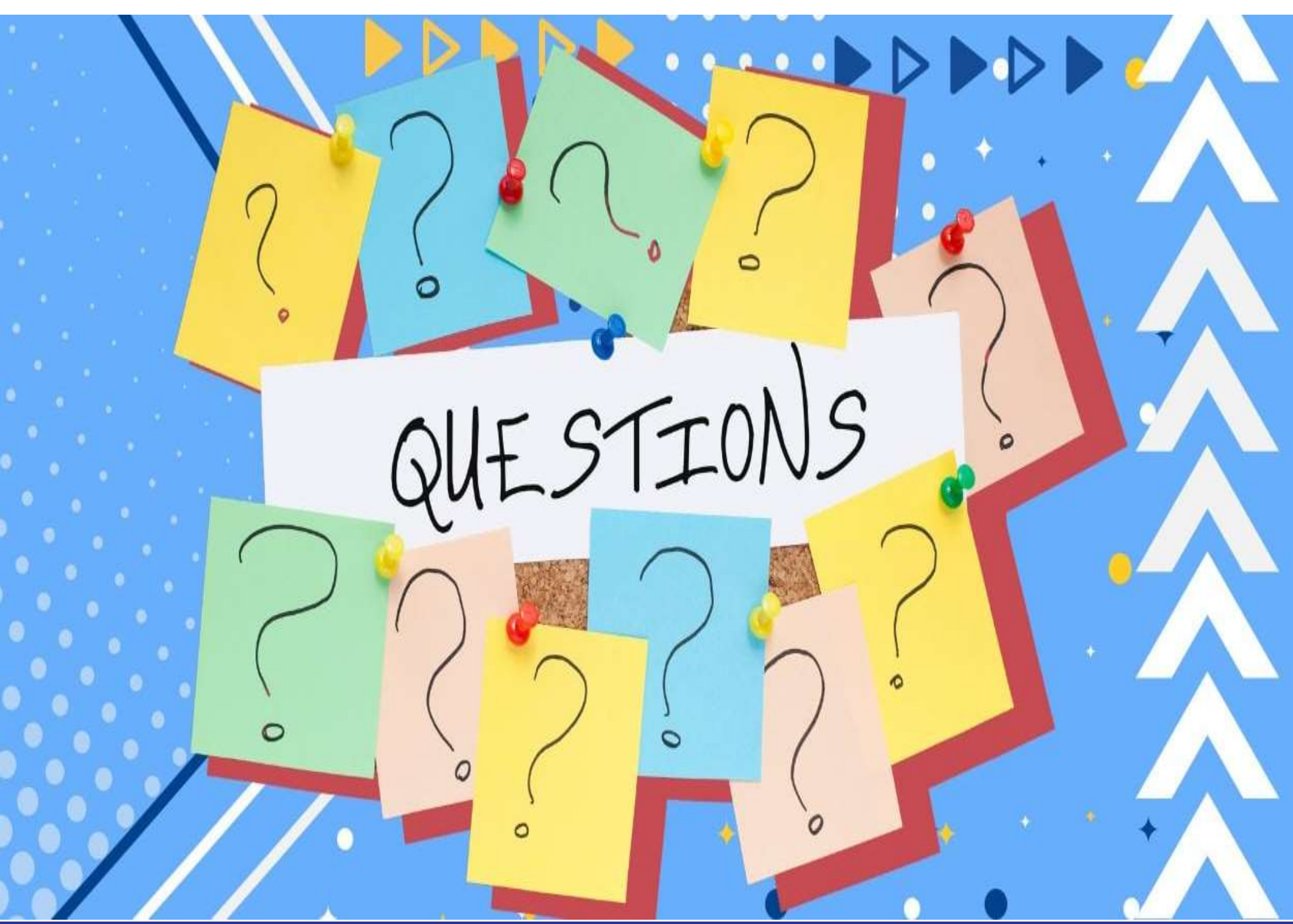
REAL WORLD ARCHIVES

African American Episcopal Historical Collection

administration@
hsec.us

Kanuga Camp & Conference Center





JOIN AN ORGANIZATION



Episcopal Women's History Project
ewhp.org



Historical Society of the Episcopal Church
hsec.us



National Episcopal Historians and Archivists
episcopalhistorians.org



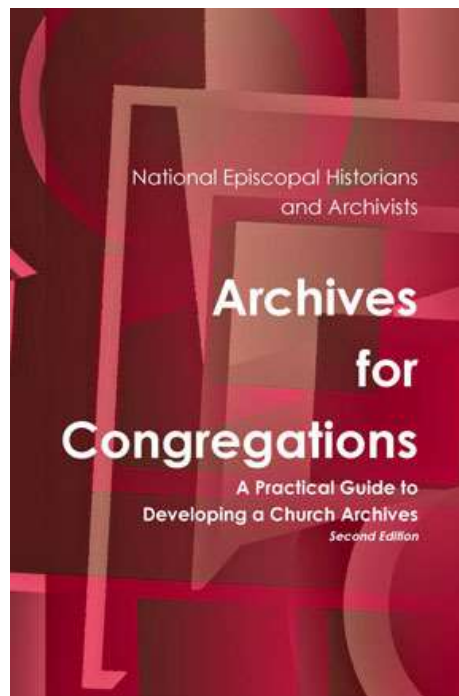
Society of American Archivists
archivists.org



Midwest Archives Conference
midwestarchives.org

SERIES RESOURCES

- Available at hsec.us/da
 - Outlines and materials presented during the series
 - Links to useful books and publications



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