



ARCHIVES BASICS FOR CHURCHES | SESSION 3

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 (hsec.us/da)



Diocese of Olympia Archives



MAKING AN INVENTORY

- **Known** materials
 - May have labels
 - May be organized
 - May have written inventory/survey and/or finding aid

- **Unknown** materials
 - random materials (boxes, piled papers, stuffed envelopes)
 - donated from private hands
 - deposited from church offices / vestry members / clergy
 - appeared from “who knows where”

CDSP Archives



MAKING AN INVENTORY

- **Inventory stuff** (sometimes called a survey)
 - **Broad** (not detailed) , **general list of stuff**
(you are not processing the items)
 - **Goal: document generally what is there**
- **Method** (not needing perfection)
 - **Work way through stuff**
(piles, boxes, folders, etc...)
 - **Use existing labels**
 - **If unlabeled, make a judgement, move on**
 - **Record carefully** (next slide)
 - **Repeat**



The screenshot shows the National Archives website interface. At the top, there is a search bar and navigation links for 'RESEARCH OUR RECORDS', 'VETERANS' SERVICE RECORDS', 'EDUCATOR RESOURCES', and 'VISIT US'. The main heading is 'Federal Records Management'. Below this, there is a breadcrumb trail: 'Home > Federal Records Management > Guide to the Inventory, Scheduling, and Disposition of Federal Records > Records Inventory - Data Elements'. The left sidebar contains a list of 'Records Management Resources' including 'Records Management FAQs', 'Memos to Agency Records Officers', 'Federal Records Centers (FRC)', 'Guidance and Policy for Accessioning', 'Records Management Policy and Guidance', and 'Federal Agency Records Management Reporting'. The main content area is titled 'Records Inventory - Data Elements' and includes an 'Introduction' section stating that agency records are inventoried by series and that forms are used to collect information. It also lists 'Series Inventory Forms (Examples)' such as 'Textual, Electronic, Microform Series Inventory Form | Instructions' and 'Information System Inventory Form | Instructions'. The 'Series Inventory Elements' section begins with the text: 'To be useful, an inventory needs to include certain elements of information for each series described in the following sections. Although some elements are useful only for...'.

INVENTORY CARD SAMPLE (FILLED)

CHURCH DIVINITY SCHOOL ARCHIVES ROOM
 INVENTORY
 PAGE 1 OF 38 PAGES

GENERAL LOCATION	SPECIFIC LOCATION	TITLE/TYPE	CONTENTS	SIZE	DATES/DETAILS/COMMENT
STACK #1	#1 (BOTTOM)	OFFICE DEPOT STATIONARY SUPPLIES	PURCHASE ORDERS AND RECEIPTS	1 BOX	1995-2003
STACK #1	#2 (1 UP FROM BOTTOM)	LB DP 10/74 PRAYER BOOKS PROCESS	FINANCE RECEIPTS & DISBURSEMENTS	1 BOX	1968-1969
STACK #1	#3 (2 UP FROM BOTTOM)	OLD CDSP LIBRARY RECORDS	1) FACULTY SYLLABI 2) BIBLIOGRAPHIC NEEDS FOR GTU LIBRARY 3) PERIODICALS NEEDED/DESIRED 4) CATALOGUE CARDS 5) ORDER FORMS 6) RUBBER STAMPS 7) GTU BIBLIOGRAPHIC CENTER POLICIES, ETC.	1 BOX	1965-
STACK #1	#4 (3 UP FROM BOTTOM)		1) CORRESPONDENCE BY/ABOUT OTHER LIBRARIES AND PUBLISHERS	1 BOX	1958-1962 IN LABELED FILE FOLDERS
STACK #1	#5 (4 UP FROM BOTTOM)	1998-2002 CASH RECEIPTS	(AS STATED)	1 BOX	1998-2002
STACK #1	#6 (TOP)	PERVINCE] VIII OCT 2012	SHRED OR BURN		
STACK #2	#1 (BOTTOM)	[MATERIALS RELATIVE TO] [THE WHOLE SCHOOL]	[THESE MIGHT BE DONN MORGAN'S FILES] EXAMPLES: * STUDIES ON SEXUALITY * FACILITIES USE * FACULTY MEMBERS * GRANTS REQUESTS	1 BOX	1980's IN LABELED FILE FOLDERS
STACK #2	#2 (1 UP FROM BOTTOM)	[ACADEMIC RECORDS]	1) SUMMER 1984 COURSES 2) FALL 1984 SPECIAL SESSIONS & COURSES	1 BOX	1984
STACK #2	#3 (2 UP FROM BOTTOM)	ACCREDITATION MATERIAL	2000 1) PRINTED REPORTS 2) 2" OF BACKGROUND MATERIAL IN FILE FOLDERS	1 BOX	2000
STACK #2	#4 (3 UP FROM BOTTOM)	ACCREDITATION MATERIAL	1) REPORTS 2) SELF-STUDIES	1 BOX	1978-2000
STACK #2	#5 (4 UP FROM BOTTOM)	MISCELLANEOUS ALL-SCHOOL MATTERS	1) DONN MORGAN CALENDARS 2) LEGAL POLICIES FOR ACADEMIA 3) RECOMMENDATIONS 4) PREGANALL CORRESPONDENCE 5) DORMITORY ADMINISTRATION 6) GRANTS REQUESTS	1 BOX	1983-2003

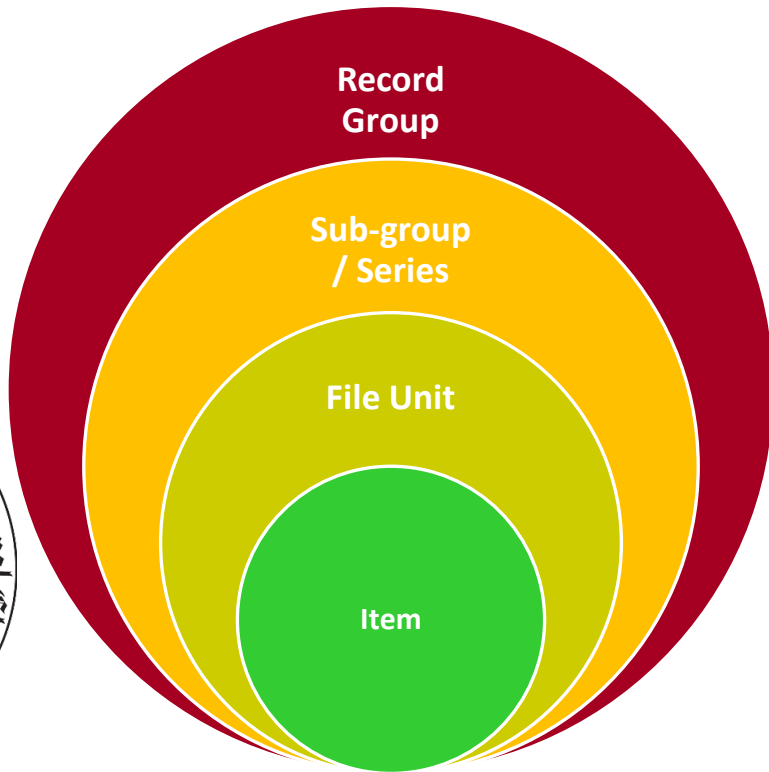


MAKING AN INVENTORY

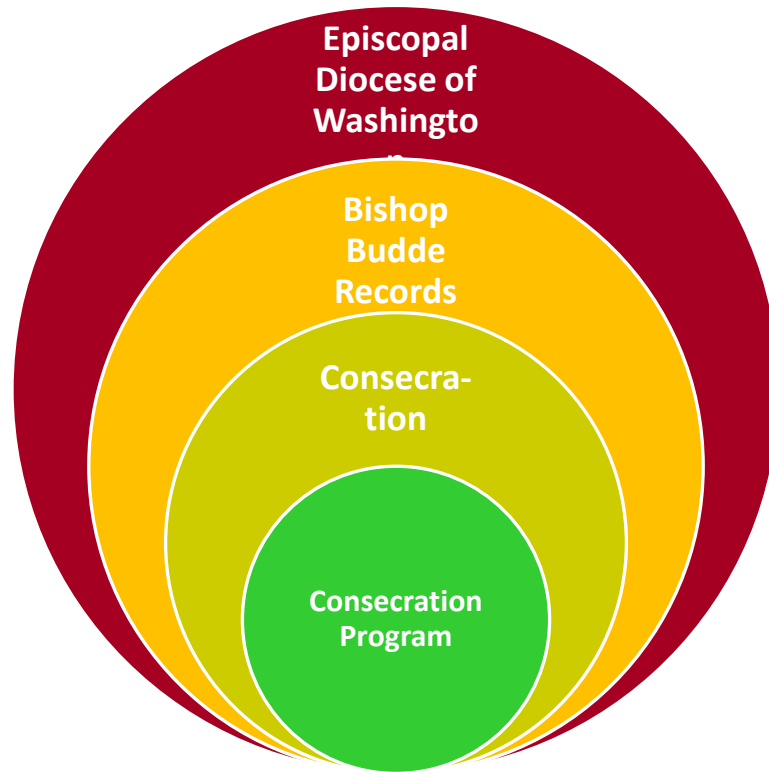
- Inventory complete = time to **organize!**
- Goal: integrate “stuff” into holding **arrangement**



Generic Arrangement



Example



Physical

Section of Shelf

Box

Folder

Contents in Folder



SAMPLE RECORDS GROUPS

ST. JAMES EPISCOPAL CHURCH, Oakland, CA

Records

Group Origin and content

- | | |
|--|---|
| <p>1 Records of the parish corporation</p> <p>A. Basic documents</p> <ol style="list-style-type: none"> 1. Articles of Incorporation 2. By-laws 3. Tax exemption certification(s) <p>B. Annual meeting records</p> <p>C. Annual parish reports</p> <p>D. Other documents relative to the corporation</p> <p>... etc.</p> <p>2 Vestry Records</p> <p>A. Minutes and related documents</p> <p>B. Extant committees of the vestry</p> <ol style="list-style-type: none"> 1. Buildings and grounds 2. Finance <p>C. Defunct committees and projects of the vestry</p> <p>3 Records of the Treasurer</p> <p>4 Office records</p> <p>5 Applicants for Holy Orders</p> <p>6 Personnel records</p> | <p>7 Worship-related records</p> <p>8 Music program records</p> <p>9 Christian education records</p> <p>10 Committees, commissions, task forces and other organizations (could include a school)</p> <p>11 Social ministries [which are not operated by committees, commissions, or other groups]</p> <p>12 General congregational publications</p> <p>13 Information about the congregation from sources outside the congregation</p> <p>14 Special events and all-congregation programs</p> <p>15 Book collection</p> <p>16 Architectural materials (incl. buildings and grounds)</p> <p>17 Photographic and illustration collection</p> <p>18 Reminiscences of parishioners and clergy (oral and written)</p> <p>19 Charts and maps</p> <p>20 Artifacts and ephemera</p> |
|--|---|



ORGANIZING “STUFF”

1. Follow / create **pattern** to organize based on:

- Known organizational pattern/structure →
- Contents from inventory
- Personal knowledge
- Church organization

- Best practice:
map out on paper

Sample Classification Scheme for Arrangement of Church Archives

<i>Record</i>			
<i>Group</i>	<i>Series</i>	<i>File Unit</i>	<i>(subgroup)</i>
1	Clergy		
	1.1	Rectors	
		1.1.1	Smith, John Z. Correspondence Personnel file Photographs Sermons
		1.1.2	Jones, Jane B. Correspondence Personnel file Photographs Sermons
	1.2	Curates	
	1.3	Deacons	
2	Ministries		
	2.1	Altar Guild	
		2.1.1	Annual reports
		2.1.2	Manuals
		2.1.3	Membership lists
	2.2	Men's Group	
	2.3	Youth Group	



ORGANIZING “STUFF”

2. Physically **sort** the “stuff”

- Like boxes with like boxes
- Like folders with like folders
- Loose items with like boxes/folders
- Unrelated material, put aside for later



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3. **Organize** the “stuff” as warranted (folder level)

- **Date** (e.g. Vestry minutes 2014, 2015, 2016)
- **Topic** (e.g. sermons by rector, or membership records)
- **Area** (e.g. committees, events)
- **When there is a clear “hole” in the “stuff,”**
make a folder for future materials that may be found



ORGANIZING “STUFF”

4. **Integrate** the “stuff” into current holdings
 - No longer the “stuff” but **items** in archives holdings

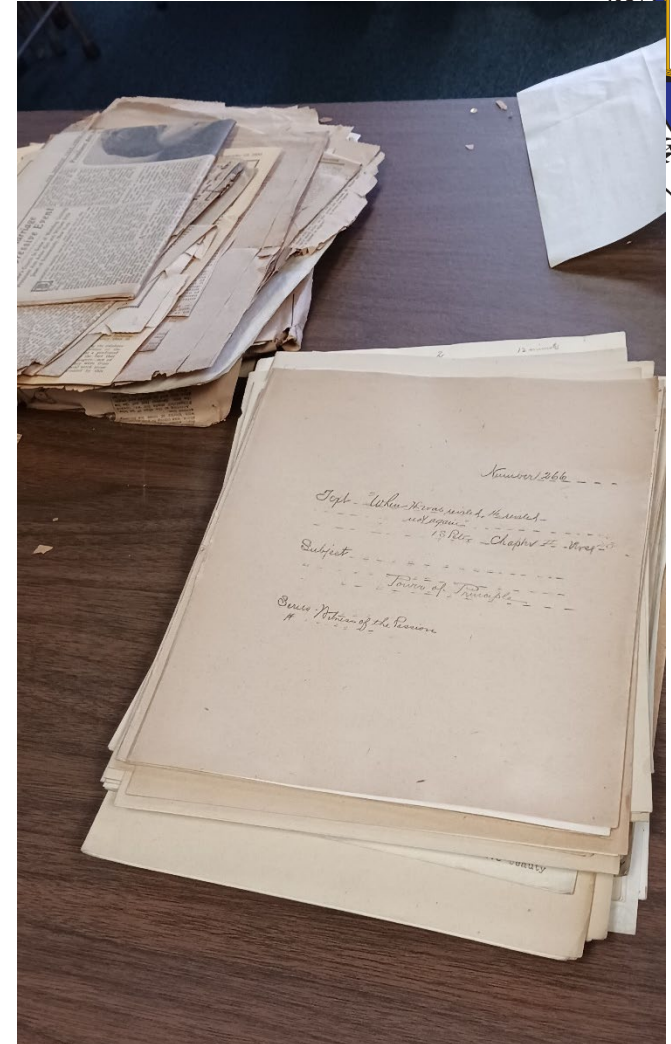


REAL WORLD ARCHIVES



St. Luke's, Scranton, Pa.
Opened in 1871

administration@
hsec.us



A vibrant blue background featuring a collage of colorful sticky notes (yellow, light blue, light green, light orange, and white) pinned together. Each sticky note has a large, hand-drawn black question mark. The notes are arranged in a circular pattern around a central white note that reads "QUESTIONS" in a bold, black, sans-serif font. The background is decorated with white polka dots, white and blue geometric shapes (triangles and arrows), and a vertical column of white upward-pointing chevrons on the right side. The overall aesthetic is playful and educational.

QUESTIONS

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

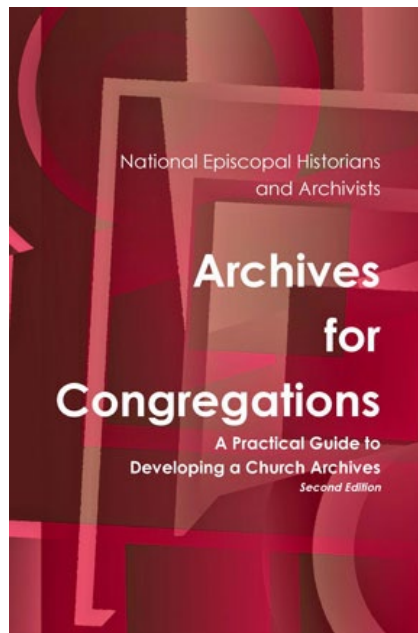


Midwest Archives Conference
midwestarchives.org



SERIES RESOURCES

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



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