



ARCHIVES BASICS FOR CHURCHES | SESSION 5

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 | Digital & Personal Papers~~

- ~~Digitization. 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)

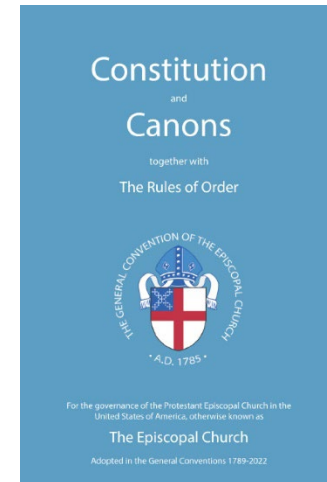


Diocese of Olympia Archives



EXISTENCE OF AN ARCHIVE

- Establish “formal” existence
 - Policy statement / resolution of governing body
 - Bylaw or Canon



Archives Policy Statement of [name congregation]

The purpose of the Archives of [name congregation] is to identify, collect, preserve, organize and share historical materials and official records of [name congregation].

The [leadership body] of [name congregation] commits itself to providing the support and resources necessary to implement this purpose and will appoint an Archivist with authority to implement archival policies and procedures consistent with this policy.

Canon

Sec. ##.##. Diocesan Archives.

There shall be an Archive of the Diocese of _____, the purpose of which shall be to preserve by safekeeping, arrange and have available necessary legal documents and items, and useful historical papers and materials of the Diocese of _____, its bishops, officials and agencies.

- (a) The day-to-day activities and work of the Archive shall be conducted by an Archivist who shall be selected by the Bishop and confirmed by _____. The Archivist shall serve at the pleasure of the Bishop.
- (b) The work of the Archivist shall include, but not be limited to, the following: securing, organizing, safeguarding and controlling access to the material in the collection; preparing and proposing operating policies for approval by the Bishop and _____; reporting on the condition and work of the Archives; and advising congregations and Diocesan Institutions and other organizations as to records retention and archive policies regarding their documents and materials.

EXISTENCE OF AN ARCHIVE

- **Why establish “formal” existence?**
 - **Clear ownership**
 - **May provide resource commitment**
 - **May provide leadership commitment**
 - **May provide basic policies**
- **Archivist action**
 - **The policy on the page means nothing until the archivist puts it into action**
 - **Invite others to help**



ARCHIVES LOCATION

- **Enclosed space – not in “reading room” / library**
 - Or locking filing cabinets / storage units
- **Securable / locked**
 - to minimize foot traffic, reduce unauthorized access (keys only to authorized users)
 - to safeguard personal information / confidential material
 - to control material in-flow
 - to prevent disappearance of material



ARCHIVES FACILITIES

- **Storage Conditions**
 - **Best that you can do with what you have** (room, cabinet)
 - **Minimize fluctuations in temperature / humidity**
 - **Minimize light exposure, especially sunlight**
 - **Remove air pollutants / airflow not on materials**



REPORTING

- **Why report?**
 - visibility
 - accountability (goals)
- **Reporting means tracking activity**
 - hours spent on archival work
 - tasks accomplished
 - people assisted
 - challenges encountered



REPORTING

- **Making the report** (every six-months, governing board)
 - Reporting period
 - A good archival story
 - Resources used (volunteer hours, financial)
 - Work done (e.g., materials sorted, filed, integrated into the collection, disposal, etc.)
 - Other activities (e.g., consultations, soliciting missing materials, transferring materials to other repositories, correspondence, etc.)
 - Needs and problems





BUDGET

If you don't ask, you won't receive.

- **Supplies**
 - Acid-free folders, boxes, etc...
 - 100% cotton/rag bond paper
 - office supplies
- **Shelving**
- **Archivist organization memberships**
- **Improved facilities**
(security, computer)

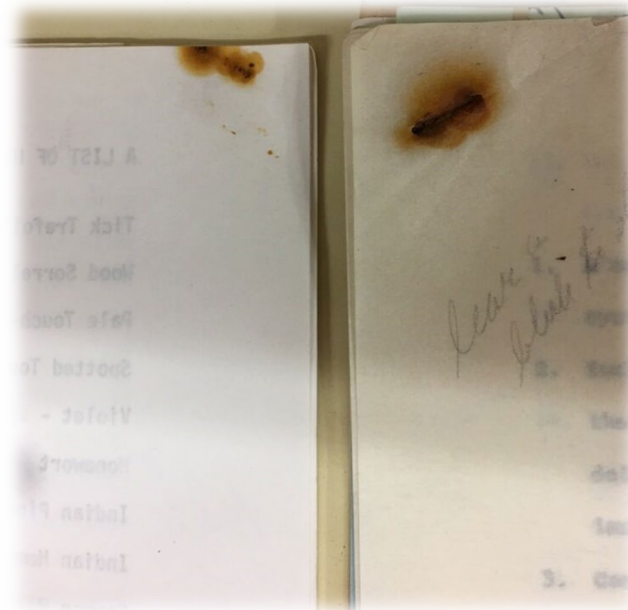


ARCHIVAL WORK PRACTICES

Acid-free is the way to be!

1. Remove contaminants

- Remove metal (see session # 2)



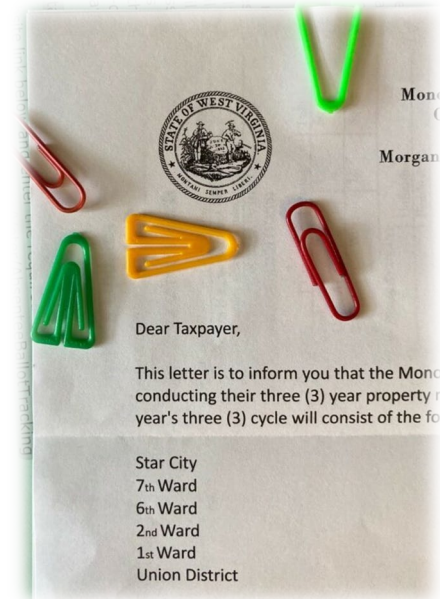
ARCHIVAL WORK PRACTICES

2. Keeping papers together

- plastic clips (not vinyl)
- paper strips over group (e.g. folded to be 2" X 5 1/2")

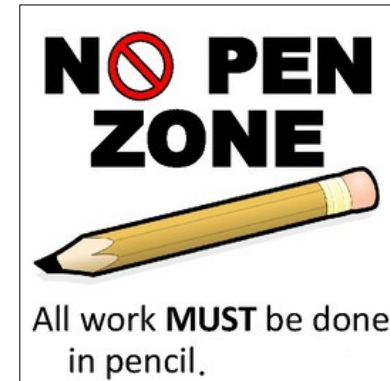
3. Never use tape

- Make a copy if need to fix



ARCHIVAL WORK PRACTICES

4. Only pencils – no ink pens!



5. No food or liquids

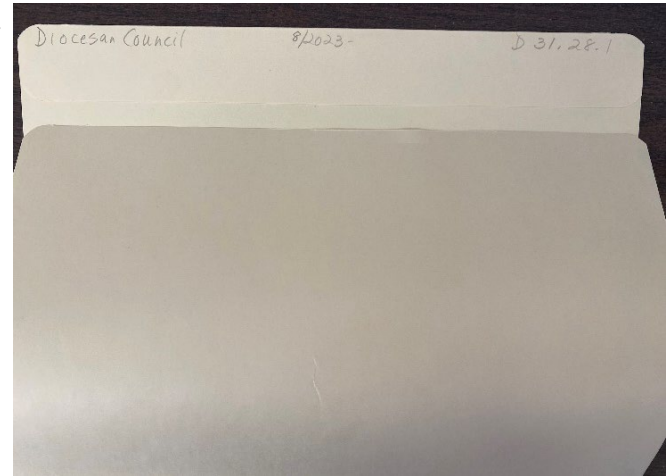
- Damage materials if spilled
- Smallest crumbs / liquid draws pests



ARCHIVAL WORK PRACTICES

6. Unique locator information on folder tab

- Records group #
- Sub-group information
- Topic description



7. Remove items on newsprint

- Copy to acid-free paper
100% cotton bond/rag bond



ARCHIVAL WORK PRACTICES

8. Dating undated items

■ Internal evidence

- reference to past/future event, known date
(e.g., Easter, a confirmation, etc.)

- reference to document with known date

- perpetual calendar to find day-month-date

- names associated, somebody holding office

■ Note date in upper right corner (in #2 pencil)

- Use question mark, possible range

- “1878?” or “1876-1879?”



STEWARDSHIP COMMITTEE REPORTS

To attain the goal of achieving consensus, the Stewardship Committee has decided not to produce another study. Instead, the focus will be placed primarily on the process of involving all constituencies to discuss issues, explore differences, and develop areas of agreement. To facilitate this process Performance consultants will produce several draft reports for discussion by the seminaries, the Committee itself, and other constituents of theological education. Three key documents will be produced this Spring:

1. A paper discussing the *Theological Context* for the project on stewardship of resources for theological education.
2. A *Fact Book* containing charts, graphs, and analytical comments about data relating to seminaries, diocesan schools, and the external environment.
3. A paper outlining the *Key Issues* which emerge from analysis of the data and visits at all eleven seminaries.

CALENDAR OF EVENTS

- | | |
|-------------|--|
| Jan. 5-6: | Meeting of Chairs of Seminar Boards of Trustees. |
| Feb.-Apr.: | Seminary visits by Performance consultants. |
| Apr. 12: | Stewardship Committee meeting, New York. |
| Apr. 13-14: | BTE meeting, New York. |
| June 5: | Stewardship Committee meeting. |
| July 24-25: | Symposium on Theological Education |
| July 26: | BTE meeting (tentative) |

EVENTS TO DATE

The Stewardship Project Committee held its first meeting on December 14, 1988. Prior to this meeting, Dabney Park met with the BTE during their meeting at Berkeley/Yale and with a small group of people asked to serve as advisors to the work on the theological context for the project. He and Jim Caplan met with the Council of Deans during their December meeting in Delray Beach, Florida. Dr. Park will also meet with the Chairs of Seminary Boards of Trustees during their meeting at the California Divinity School of the Pacific early in January.

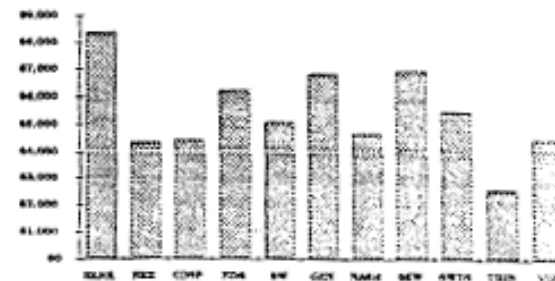
SEMINARY VISITS PLANNED

The consultants will visit each of the eleven Episcopal seminaries during the course of the Spring. Drafts of a paper on the theological context of the project and of a *Fact Book* containing data pertinent to theological education will be circulated in preparation for these visits. Meetings will be held with the deans, their administrative staffs, the faculty, and the students.

These two-day seminary visits will provide an opportunity for the consultants and seminary deans, faculty, and students to discuss the theological issues behind the stewardship project, to verify the data in the draft *Fact Book*, and to explore the implications of this data for the future. During this process, key issues for the future of the seminaries and of theological education will be identified by the seminaries and the consultants.

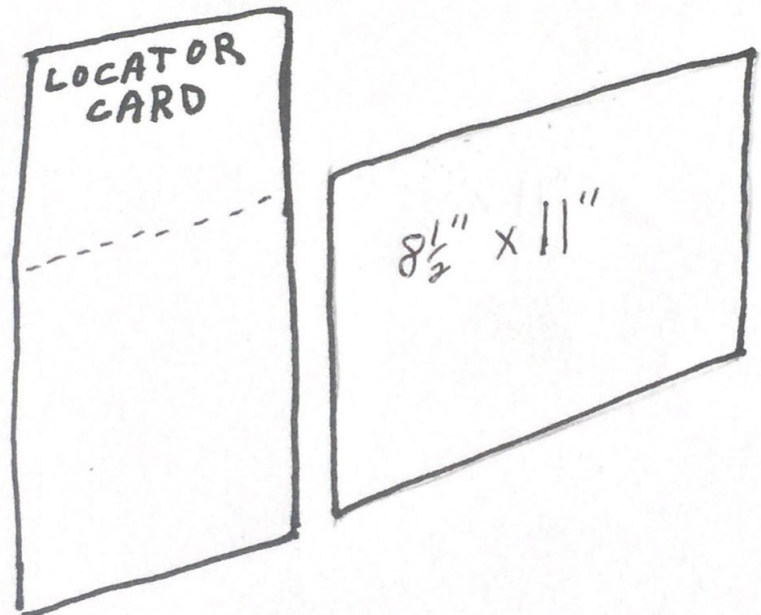
SAMPLE FACT SHEET

Comparison of Tuition for 1987-88
Eleven Episcopal Seminaries



ARCHIVAL WORK PRACTICES

9. Use place holder when working with documents
 - Stiff tag board item larger than letter sized
 - Place when document, file folder, box temporarily removed
 - When returned, remove card



ARCHIVAL WORK PRACTICES

10. Minimize curling / slumping in boxes

- Content to back of the box (weight in back)
- Fill front space (acid free)

Temporary



Regular



ARCHIVAL WORK PRACTICES

11. Acid-free best practice

- acid-free file folders
- acid-free boxes
- acid-free book markers
- photographs interleaved with acid-free paper or polyester / polypropylene sleeves for photographs
- Dozens of vendors
- Shop around, look for sales



ARCHIVAL WORK PRACTICES

12. Mark your place! (when leaving)

- Assume you won't remember / someone else needs to know
- Descriptive note with materials
 - folded blank sheet
 - use color pen or Sharpie
 - top of pile
 - “contents semi-organized”



REAL WORLD ARCHIVES



Trinity Church,
Boston



REAL WORLD ARCHIVES

Trinity Church,
Boston

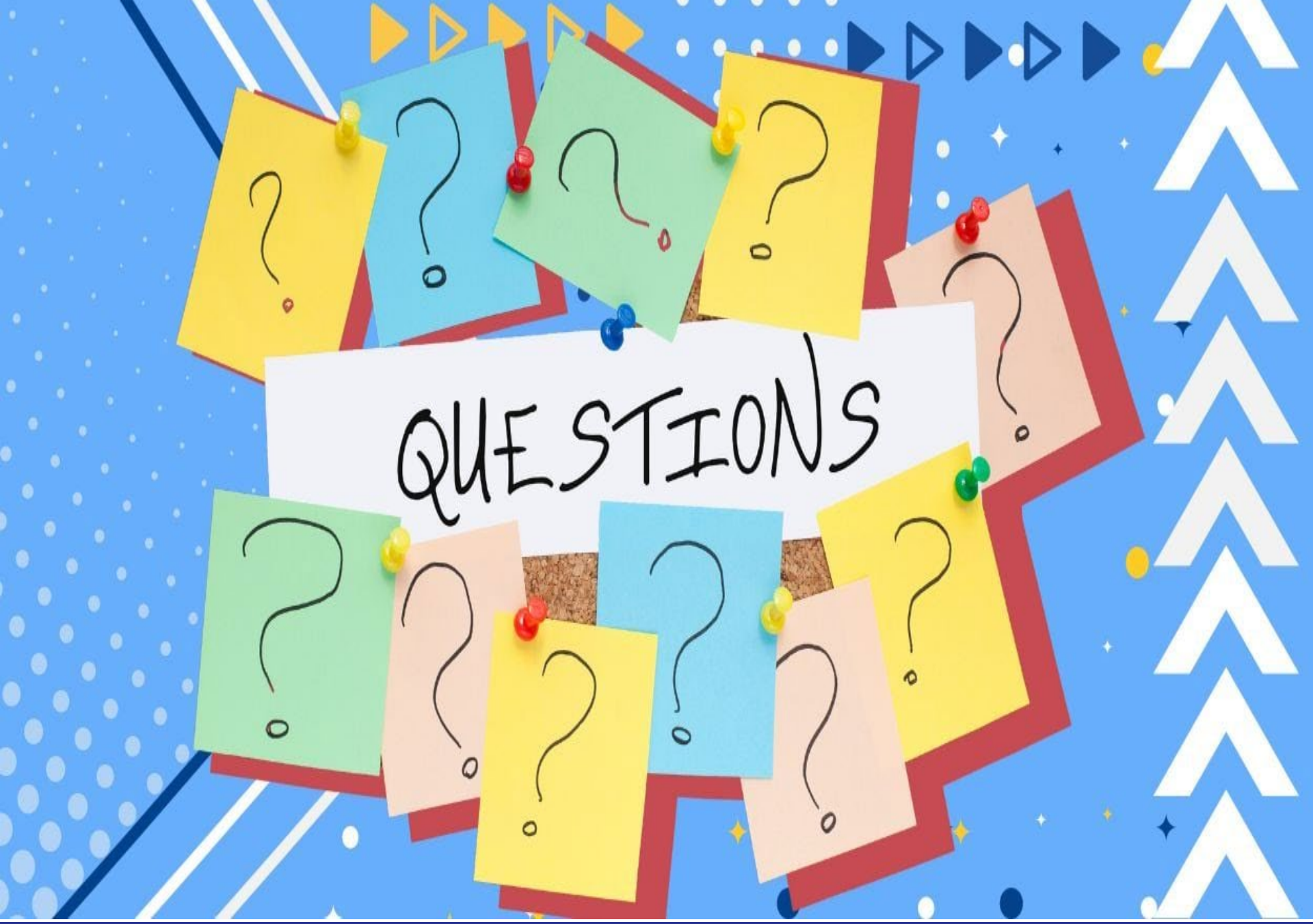


REAL WORLD ARCHIVES



Christ Church,
San Antonio





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

- **SAA Solo Archivist Section**
 - **Join up to three section discussion lists without having to join**
 - **Search past discussions**
 - **Peruse Section's online resources, sample documents.**
 - **Digital current and past issues of Archival Outlook.**
 - **Subscribe to In the Loop, biweekly newsletter upcoming workshops, publications, other items of interest to archivists.**
 - **Listen to SAA's podcast “Archives in Context”**



SERIES RESOURCES

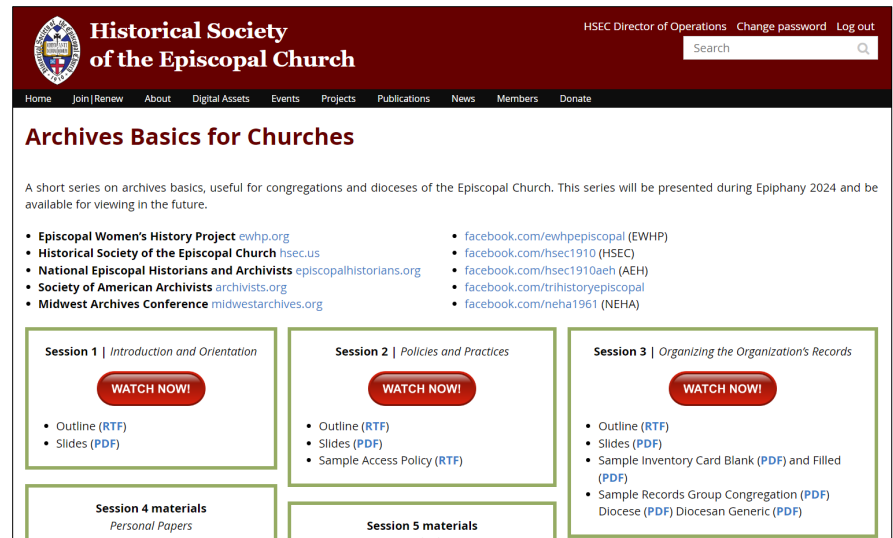
- Available at hsec.us/da

- Outlines and materials presented during the series

- Links to useful books and publications

- Watch email for evaluation

- hsec.us/abc



The screenshot shows the website for the Historical Society of the Episcopal Church. The header includes the organization's name, a search bar, and navigation links: Home, Join | Renew, About, Digital Assets, Events, Projects, Publications, News, Members, and Donate. The main content area is titled "Archives Basics for Churches" and includes a brief description of the series. Below this, there are two columns of links to related resources, including the Episcopal Women's History Project, the Historical Society of the Episcopal Church, National Episcopal Historians and Archivists, the Society of American Archivists, and the Midwest Archives Conference. The page also features three session cards, each with a "WATCH NOW!" button and a list of available materials such as outlines, slides, and sample access policies.

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