TAKING THE FIRST STEP IN ARCHIVING YOUR CHURCH'S RECORDS

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KYLE ROBERTS: Good afternoon, everyone. My name is Kyle Roberts, and I'm the Executive Director of the Congregational Library & Archives. Welcome to today's virtual workshop with the CLA's archivists, Zachary Bodnar and Billy McCarthy, on "Archiving Your Church's Records."

To begin, I want to acknowledge that the Congregational Library & Archives resides in what is now known as Boston, which is in the place of the Blue Hills, the homeland of the Massachusett people, whose relationships and connections with the land continue to this day and into the future.

For those of you joining us for the first time, the Congregational Library & Archives is an independent research library. Established in 1853, the CLA's mission is to foster a deeper understanding of the spiritual, intellectual, cultural, and civic dimensions of the Congregational story and its ongoing relevance in the 21st century.

We do this through free access to our research library of 225,000 books, pamphlets, periodicals, and manuscripts and also through our digital archive, which has more than 100,000 images, many drawn from our New England's Hidden Histories Project.

Throughout the year we offer educational programs and research fellowships for students, scholars, and churches, and really for anyone who's interested in Congregationalism's influence on the American story.

Now let's turn to our great speakers.

Zachary Bodnar graduated with a Masters of Library and Information Science from Simmons University, with a concentration in archives management, in 2018. Prior to his work at the CLA, Zachary worked at the Bellamy-Ferriday House and Garden archive, the Vassar College Special Collections, the Harvard Law School Library, and the Harvard Botany Libraries. Zachary joined the CLA as an Archives Assistant in 2017, helping to prepare materials for digitization through the New England's Hidden Histories Project. In 2018, he took on the title of Archivist. His professional interests include metadata collection and management, digital archiving, audio/visual preservation, and archives management.

Billy McCarthy graduated with a Masters of Library and Information Science at Simmons University with a concentration in Archival Management. Billy started working at the CLA through a graduate internship and was hired full-time as an Archivist in 2018. His work

includes processing some of the oldest and most complex collections housed in the archives here, and he also manages reference requests and serves as the archival collections manager. Some of his professional interests include increasing access, collection management, processing of complex materials, and facilitating research.

And I really couldn't think of two better folks to lead our conversation today, so with that, I'm going to stop talking, and I'm going to bring up Billy and ask him to lead us off. Thank you.

BILLY MCCARTHY: All right. Thank you, Kyle, so much for that kind introduction, and welcome to everyone joining us today. We are so excited with the positive response that this event has generated.

Having worked with many churches in our time here, you know, we recognize the need in providing guidance and resources so that you can start preserving your church's records. We are so happy to have you all here, and we encourage you to share what you're learning today and the eventual recording with other members of your church, other churches you might interact with, and your surrounding community.

So as you can see, the image on the screen here, this is just a part of the archives office we have here at the CLA, and sort of serves as a holding ground. I thought it would be a good idea to sort of start with an example of the various shapes and sizes of the boxes we have just to give you a visual. You can see in the bottom right, you know. there's a little bit of a produce box, and while that's not ideal for long term, you know, it's a much better solution than on the floor or having things scattered in ten different locations.

You know, today's conversation is just a start of what will be a multi-faceted approach from us here at the CLA. In the past, we've created resources for churches that were trying to do this sort of work, and some of you probably have some of those resources. It is our intention to reignite and update all of this to better meet the realities of today, and this event sort of serves as the beginning of that process.

You know, I want everyone to keep in mind that this will just be a brief introduction, and our main goal is to just get you thinking about how to engage in records management. But do keep in mind that a robust program cannot be built in a day. It's just... you can't do it. We also recognize that this kind of work can appear daunting or even scary, but we're here to do our best to help demystify that process. And the fact that you've joined us today or are listening to this at some point afterwards, you know you should be praised because you are on the path to preserving your community's mission and history in a way that frankly many other churches are just not. Next slide please, Kyle.

All right, so let's begin. I wanted to start just by providing a very short definition. What exactly is records management, and why should your community even care?

So records management is the organization and control over the various items created by your church and is a vital component of preserving the community's mission, knowledge, and history. You know, this includes everything from committee records, to sermons, to other ministerial records, correspondences, and a whole lot more.

You know, as the reference archivist here at the CLA, I can tell you firsthand the emotions that people will feel when they're able to see their families and friends mentioned in anything from a photograph to baptisms, even just a passing mention in the notes from a secretary. You know, the work that you're going to be doing is not only going to benefit your community as it is today, but I promise you that it will be greatly appreciated by the people in the future.

You know, one example of this in action was when I helped a woman who was looking for information on a family friend she had known as a child. I was able to find a photo of that woman and also a signature from when she was the church's secretary. The woman who had asked the question had never seen this photo, and she didn't even know that the family friend was the secretary of the church.

You know, the excitement and joy that this woman expressed to me is one of the top reasons I love what I do here, and I hope by talking with you, and all we're gonna do today, you can start to lay that groundwork for that joy to be expressed by others in the future. You know, while a small example, you know I just wanted to provide a sort of concrete understanding of what preserving your records can mean—not just for you and your community today—but for people you may not even know, and conversely, you know, in my role as the steward between the records we hold and the people asking about them, nothing is as sad as having to tell someone that the records for their family or friends is missing or gone.

You know, to be clear every church has its limitations—be it money, time, or personnel—but by even just being a little proactive, the benefits in the long run can be very far-reaching.

So now we're gonna go ahead and start discussing the types of church records, the basics of active records management, and a little bit about digital archiving from Zachary. I'll then come back and talk a little bit about the CLA as a possible location for records and briefly discuss other options.

So with that, take it away, Zachary.

ZACHARY BODNAR: Thank you so much, Billy.

So now that we've talked a little bit about what records management is, we should probably talk a little bit about what a church record is.

So what exactly are church records, and what do we even mean when we say "record?" Do we mean anything that looks like... anything that the church produces? Do we mean only the administrative records? What does a record even look like? Well, next slide please.

Well, in the grandest sense, nearly everything can be considered a church record. When we talk about church records, we are talking about documents, information, data, things created by or received by the church in the course of its normal activities. So of course the minutes of the annual meeting are records, as are the monthly financial reports, and so too are the volumes of baptismal records.

But we want you to think more broadly about what is a church record. Records capture the memory of a moment in time, so yes, when we talk about church records we are talking about the annual reports. But we're also talking about the photographs taken of that 4th of July celebration. We're talking about the video of your pastor's retirement sermon. We're talking about the records which document, which not only document the mechanical operations of your church, but also record the records that document the history of your church's mission and community.

On the screen here is a list of some of the most common types of records which we at the CLA run into. Not every church is going to have all of these types of records, but we expect most churches will have plenty of records similar to this list. And this isn't an exhaustive list of every type of record, but we think it's a good place to start as you think about what kinds of records your church has. Next slide, please.

Just as church records encompassed many types, church records also come in all sorts of shapes and sizes. But when I think of records, I immediately think of loose papers sorted into manila folders. But that's not the whole of it. Sure, paper is and will continue to be a majority of our records, but we must think a little bit beyond just those manila folders. Even with paper records, we have a wide variety of shapes and sizes. Paper records can be bound or unbound, pamphlet size or letter size, handwritten or typescripts.

But beyond paper records can also be photographic prints or records on DAT tape from that old video recorder, or a CD that has the audio of a sermon on it, or a flash drive that has all of those photographs from the 4th of July. For those records that only exist as ones and zeros, as data, like the weekly post on Facebook or an email communication between admins. Again, when thinking of records, it's important to think in broad terms. Next slide please.

So yes, and the reason we suggest thinking broadly about your records is that we want to ensure that you are thinking about the whole history and whole story of your church and community. We come from this... from a position of sometimes seeing records that haven't been included within a collection. More than once we have heard stories about how, after a church has closed, a majority of non-administrative records have been lost or destroyed

because it was believed they weren't important to the collection or not enough, or old enough to be of value.

But really, those records are valuable. A church's mission, community, and its memories are found in all sorts of records, and we want to be here to support you to ensure that these memories are preserved in perpetuity. Next slide, please.

So now that we have some idea of what a record might be and what it might physically look like, let's talk a little bit about how we might go about managing these records.

So right off the bat, I do want to say, and Billy's already covered this a little bit, you will always be the best steward of your own records. Your church and community have a unique connection to those records through a shared history that is likely generations long at this point. Further, the primary audience of records of an active church will continue to be the parishioners and the local community that that church belongs to.

So, while we're here to provide support at the CLA, in general we want to always start from a place where we believe that you are the ones best suited for managing your own records.

And now, records management can be complex, and hard, and time consuming. And I say this not to be discouraging, but to just set some expectations. But while records management can be difficult and can be long and time consuming, we do believe that there are some fairly easy first steps which you can take that will help set up your church and your church's community for success and that don't require huge investments in time, people, or money. So, next slide please.

So the first step, hands down, that we always recommend is that you form a records committee. The primary reason we always suggest this as a first step is that the more heads will be better than one.

Too often in the course of our work, Billy and I, we've run into situations where there's really only maybe one person at the church who has any real understanding of the records situation, who knows where everything is, who can point out to say, ah that record book is over in that office and that record book is stored under this box on shelf two of the vault.

And that, that can be dangerous.

Those people those... that person is always a wonderful person, but a records committee helps to ensure that there won't be a knowledge gap in the future. And, more importantly really, will help ease the workload of any single person.

We suggest that this committee should have all sorts of different stakeholders on it: members of the ministerial staff, of the administrative staff, some of your volunteers and lay

parishioners. This is a good starting list for thinking about who are the stakeholders that are and will be invested and interested in the management of your church's records.

At this point, too, we always like to say that records management is an ongoing process. Things will move slowly. Problems will take time to resolve, and workflows will take a while to become refined. And that's normal. That's so incredibly normal, and it's okay.

The point of the committee and records management isn't to solve issues overnight, it's to create an environment conducive to the preservation of your records. So, next slide please.

Next step would be for the committee to work with the church community at large to gather your records. In general, we suggest that all of your church records should be stored in a, as much as reasonably possible, in a single location somewhere within the church's property. That can be a vault, a side room, an office, a library if you have one, or really any area with sufficient space.

Security and climate control are always going to be issues, and important issues honestly. But for now, what we really want to be thinking first about is physical space. Records take up a lot of it, and you want to ensure that you're storing your materials in a space that will not instantly become overcrowded.

Overcrowded records: records that are on piles on piles, loose materials on a floor, those kinds of situations will be more damaging and dangerous to your records than having your records possibly be exposed to somewhat higher humidities for a portion of a year.

So space kind of, in this environment, becomes our first concern. And then security and climate control later.

During this phase, too, we also want to start figuring out where your records currently are. Even if the majority are all already in a single space, it's likely that some records aren't gonna be there already.

There might be records that are held by the community in basements and attics, something that was inherited by someone's grandparents or parents a long time ago. There are probably records that are held separately by the administrative or ministerial staff that could be a part of your church's records that could be more readily and easily accessible if they were in the single location with everything else.

So, use this time when you're gathering the records to, as a committee, to begin reaching out to the various stakeholders and creators of records in your community, and to ask them what they may have, and to start creating a timeline and a process for getting all of those materials also into this newly identified perhaps newly identified space. Next slide, please.

So you've identified a space for all your records, and you've begun to gather them all into that space. So what's next? Well, for us, we would suggest to begin organizing those records.

And when we say that, we don't mean the kind of organizing that us archivists would do. Archival work is incredibly time consuming, and can be tedious, and is honestly it's a little bit... When we do archival work, we're doing it for an audience that has no experience with these records.

For you within your own church, you're going to have experience with these records. You're not going to need to do the kind of detailed work that we do.

So when we say organizing, we don't mean like archival organization, but we do mean still applying some sort of very basic organizational principles to the collection that can go a huge and long way to help ensure that, at the moment, this moment in time and into the future, that that collection can be used and grow.

So, the first thing we suggest is to create some overarching organizational schema. We like topical schemas in the archives world, such as organizing records by say financial records, administrative records, building records, etc. Other schemas can work just as well. Chronological schemas, where records are stored in a chronological order, work and can be the most appropriate for certain collections.

It's always gonna be dependent on what your particular collection looks like and what your particular situation is.

The real main thing, though, is to pick a schema that works, and to stick to it.

Of course, refining is always going to be a part of the process. You're going to create a schema and then you're going to run into a record that 50% of it is administrative, but 50% of it is financial—so which bucket do I put it in? And you'll have to figure that out along the way as you run into those questions, but those questions that you run into will help you refine the schema that you've already put that work into creating.

And that's, that's the main thing, is to go into it with an organizational thought and then refine it as you go along—not to, sort of, create it ad hoc as you go along.

If you have the capacity of funds, we do also suggest using this phase to begin re-housing materials. By this, we largely mean placing loose papers into manila folders and folders into boxes such as banker's boxes.

For both folders and boxes, there is going to always be that archival safe best practice variety, but we don't really want to or need to go that deep here. Yes, acid-free boxes or folders are technically best practice. They're also more expensive.

If your budget is tight, you're not gonna be putting your records in any significant danger if you stick them... if you go to Office Max and buy a stack of banker's boxes. Those are going to be perfectly fine. They are going to absolutely work for your collections. They are not gonna put them in excessive danger, if any danger at all.

So yeah, pick the boxes and folders that fit your situation both in terms of space and in money.

We also finally use, suggest to use this time to begin identifying duplicates. Generally speaking, you never need more than one copy of a record. So if you have five copies of a single Sunday bulletin, you have my permission to feel free to recycle those four extra copies, or give them out to someone else, or... but to not include them in the permanent collection.

Leaving duplicates out of a records collection can honestly save you significant space, and will always make, and also always make the collection just generally easier to use. Weeding duplicates is going to save a lot of space, trust us on that one. So, next slide please.

So what we've got over here is some of, sort of three starting places, we think will put you on a path towards success. Even if you stopped at step three, your records will be in a really good spot.

And, but, there is more that can be done. We don't, unfortunately, have time to go over them today, but on the screen are some of these possible next steps to create an inventory and map of where everything is, kind of like a, what we do with a finding aid.

Or you could create a records retention schedule, which is a document that describes how long certain types of records you're gonna keep. Certain records are always going to be permanent records, but things like a contract with a building renovation contractor, you really only need to keep that for about seven years before the record itself becomes not useful. So that, when you're thinking about in the future what materials to add to your permanent collection, that sort of record is really important.

And these are things that we're happy to talk with you about, and in the follow-up email to this program, we're gonna be able, actually linking some of these additional resources, resources that talk about some of these topics on a very broad level. So you'll be able to see some of what those next step resources might look like. So, next step please, or next slide, rather.

Now you may have conspicuously noticed that I've been a little bit recalcitrant in my mentions of digital records, and that's for a couple of reasons. The big one is that we as archivists really haven't fully figured digital stuff out.

Digital records are complex. They're prone to damage. They're difficult and expensive to store and maintain, and they suffer from a kind of obsolescence that physical records just don't.

This isn't to say that digital preservation and management isn't possible. It, it is, but it just it takes a bit more to handle and more to think about, and there are some very basic steps that you can take, which I'll go over in just a second that can help you manage your digital content. But this is still a field where, even us professionals, we're still figuring it out, we're still trying to figure it out. And some of that is that new technology is constantly on the horizon, and it constantly throws a sticky wicket into what already are our best practices. So with that, let's talk about some of those basics. Next slide, please.

When we talk about digital stuff, we're talking, we're kind of talking about two wildly different creatures.

On the one hand, we have the physical storage media device. This is your hard drives, your flash drives, CDs, DVDs, VHS and other magnetic tape storage devices, and honestly a whole slew of other acronyms for types of storage media that are and are not relevant anymore.

On the one hand. On the other hand, we have born digital content, which may exist on those physical digital storage media or in a cloud-like environment and are at the most basic level information that exists only as ones and zeros, is information that was created on a computer in a digital environment and was primarily meant to only stay in that environment.

For your physical media, you want to have a space where all of your external devices are stored together. If possible, label each of those devices so you know what's on it. If you have a flash drive with photographs for the 4th of July celebration, put a label on it saying so.

Also, if you want to make sure... also you really want to make sure your digital devices are in a climate-controlled environment and away from sunlight. As much as humidity, and sunlight, and temperature changes can damage paper, paper is still generally gonna be way more resilient to all of those things than digital storage media. CDs, especially, are really prone to some of these climate problems, and this kind of gets to my next step.

Finally, you want to create a plan to regularly back up those devices.

CDs have an expected lifespan of really only five years.

Flash drives, most are pretty cheaply made, probably have less than five years, though some can survive longer.

Hard drives have maybe ten years, but depending on the style and how often they're used, they're quite prone to failure. And some of the older hard drives, the disk drives, when they fail, they, they're dead.

And really, with any of these types of devices, if they fail, you're not gonna be able to easily retrieve whatever is on those devices. So you should have a plan to back them up.

Have you... then there's how you back them up, there's a few different thought processes.

Some of it could be you stick it onto, like, a Google Drive, so it's cloud storage for your physical media. You just have a cloud version of what's also on your flash drive.

Another version is that you have have multiple copies on multiple external devices, so that if one of them fails, not all of them are gonna fail at the same time. So you can always have the example, classic example there is have, if you have copy... if you that 4th of July celebration, have three flash drives with all of those photographs on them.

Another example could be to print things out, and that's, let me get there.

So, now let's look at what digital content's likely found on those devices.

For starters, if you have a digital document that is deemed important, however you define important as a church, then print it out.

Paper is gonna be the better store, is gonna be, for important things that you really, absolutely cannot or should not lose, if it's on paper, you're gonna have a better chance of it not being lost.

Also, for your digital content, keep your files organized.

Similar to how we suggest creating an organizational schema for your physical records, we suggest that you do the same for your digital records. You can, in fact, use the exact same schema that you use. If you created a topical one that had administrative records as a topic under which you organize your records, also create a folder in a central digital device that is administrative records.

Also, when a document you are working on is finalized, save it in what is referred to as a preservation format.

One of the links I'll be sending out later covers what these types of formats are, but like, one of the biggest examples would be for, instead of saving documents as a Word document—Word being a proprietary Microsoft format—you instead save a final version of the document

as a PDF, which is considered a much more open preservation and preservation-acceptable media.

And finally, explore how the services you use to create, publish, and share digital content allow you to periodically archive your content. Most social media sites and email will allow you some way to archive your data, archive your emails. So you should explore those options because archiving web content is really complex, but there, it's something to at least keep in the back of your mind, that you want to be also thinking about those as records and memories.

And finally, well for me, one last slide. Finally, I want to talk a little bit about digitization very, very briefly.

In the past, there was a line of thought that digitization could be used as a method of preservation, to save space primarily. We as a profession no longer have that line of thought, as we now think of digitization almost exclusively as a means to provide enhanced access for a defined user group to a specific resource, and frankly that's because paper is and for the foreseeable future will continue to be, the safest most stable preservation media, period.

So all of this is to say that we do not generally recommend that churches really even think about digitizing your own records.

Digital records are inherently unstable, and they are far more prone to catastrophic damage than paper records are.

Just think about how often a file format or a digital storage media has essentially become obsolete in the last 20 to 30 years alone. I mean, perhaps one of the more recent examples is how many new computers aren't coming with disk drives anymore.

So, with that in mind, and for these reasons, we do not generally recommend digitization. If you do begin a digitization project though, and there are a lot of reasons to, as we said, digitization is really good for access, so if you have a group of records that you need to or want to provide access to for a part of your community for any reason, digitization isn't a good idea... or is a good idea, rather.

But when you do that kind of project, always remember to keep the original documents. The digital should not be thought of as a surrogate for the original, so, just as a second copy of the original.

Always, always keep the original.

And with that I believe I've covered most of what I've set out today to cover about topics of records, records management, and digital preservation.

Of course, if you have questions, then I really hope you will please use the Q&A feature, and we will try to answer as many as we can at the end of this presentation.

In the meantime, Billy has a bit more to say about the CLA and our specific services, which we can help provide.

BILLY: All right, well thank you so much, Zachary, for that excellent overview. I'm sure you are all buzzing with ideas and thoughts right now.

I want to just switch gears for just a little bit and briefly touch upon the archives here at the CLA and some of what our professional archiving involves.

So we've been in operation since 1853, and we're at our current home on 14 Beacon Street in downtown Boston since 1898. Our archival collection contains well over 1700 cubic feet of material.

While a majority of our collections are centered around Massachusetts and the New England area, we also have a significant amount of records from the Chicago area and most of the rest of the US.

Some of the most well-known collections we have here include the Old South Church and the Park Street Church here in Boston.

You know, as archivists, Zachary and I provide new collections with the sort of professional grade services, which include housing records in the climate-controlled storage space as well as engaging in a series of tasks with an eye towards sort of long-term preservation.

So, when we say preservation, that includes sort of a series of activities, such as rehousing collections into acid-free boxes and folders--an example of which you can see on the right here--identifying items that may be at risk of molds or other issues that would have an impact on sustainability, to more mundane things such as the removal of every archivist's greatest nightmare: the metal staple.

The end result will be what we refer to as a finding aid, which if you don't know, think of it as just a more detailed inventory. The idea is that someone hoping to view a particular collection can get a broad overview of what is within that collection by reading the finding aid and not necessarily having to be here physically.

For those of you that have worked with us in the past, I also just wanted to highlight a couple of changes we've made around our collection policies.

One is that we now collect material from churches that are still active, whereas in the past we had only done so under very specific circumstances.

Another is that we are no longer accepting material on temporary loan and only by a permanent gift agreement.

You know, while we would obviously love, in an Ideal world, to be able to take on and steward the records for all of your churches, this is just simply not feasible. That is why, you know, in lieu of taking all of those records from all the churches, you know, we're here to empower you to start putting together your own archives. If I could have the next slide.

So in my dealings with churches, I've sort of, there's always been a... I've often heard the community having hesitations in having their records located in Boston.

And to be clear, even if we can't take on those records or you would prefer them stay with you, that does not mean we're not here to help you. You know, part of our goal here is not just to horde records, but it's to make sure that the story of Congregationalism is being preserved and remembered.

You know, a good example is if you're joining us from the west coast, Hawaii, or Alaska, you know, you may want to keep those records a little closer to home where the community can readily access them versus, you know, a long plane ride over to Boston.

So in these kinds of situations, I really want to encourage you all to reach out to your local historical society, local town hall, or even a local museum if you have one. While they might not be able to or willing to take on your records, I just, I really want to recommend that you at least reach out and see if some kind of arrangement can be made.

Additionally, if you're located near a college or university, they can be an excellent resource in helping to either take on the collections or steward them in some way, especially ones that really focus in on local history. You know, like the other places, they're very dependent on their resources.

But, you know, what I'm trying to get across here is that you really should talk to them. I have a couple of different examples of us not being able to take on a collection but instead connecting them and connecting that community with another stakeholder that they didn't even think about.

So as we conclude, you know, I just want to really drive a point home here.

Please do not throw out your church's records without checking in with at least one of the resources I've discussed—us or anyone else.

Unfortunately, it is far too common for us to hear about churches that had thrown away their oldest records because they either didn't see the value in them that, you know, we might have seen, or they just felt they didn't have any other options.

You know, nearly all of the records in your possession are irreplaceable, and so many of those memories, that knowledge, that history, that's, that's lost when that happens.

And, you know, reinforcing, do not undervalue the records your churches hold. You know, those records that are hiding in someone's attic, stuck in someone's basement, behind equipment in a random closet, you know, they're telling a story of your community, its values, its mission, and its history.

And I sincerely hope that after just this brief conversation today, you don't just see a volume that's taking up space that you're unsure what to do with, but instead you see an artifact that's in need of, you know, protecting and preserving for both your community today and the community in the future. Next slide, please.

So yeah, Zachary and I, you know, both hope you've enjoyed learning just a little bit about archiving your church's records and are starting to think about, you know, taking that first step that Zack laid out for you.

You know, as I hope we've driven home, while this is not a simple task, it's one that really shouldn't scare or intimidate you. Again, by listening to us today, you're already on the right path, and you know, I speak for the rest of the CLA when I just want to congratulate you for coming out today and participating.

You know, as I mentioned, this is only the start of our increased records management guidance, and I really encourage you to sign up to our e-newsletter, our Facebook page, our Twitter page as well, and our YouTube page. We'll be sending out alerts of the new resources through all of those when we make them available. Also, this recording will eventually go up on our YouTube page, so please share it with your community and other communities you think could benefit from it.

Again, thank you so much for joining us. The outreach has been absolutely fantastic, and, you know, we hear you loud and clear, and we're really looking forward to moving on.

Well, I'm gonna go ahead and turn it back over to our Executive Director, Kyle Roberts. Thank you.

KYLE: Great. Let's just pull up Zachary as well. We have the... well the questions as Billy and Zachary will be able to see on this end, are absolutely rolling in. We have about 16 minutes to get to them, and I wanted to say that for any questions that we don't get to today, we will,

we're able to save them, and if you if we have your email attached to them, we will reach out to you with answers directly.

We will also, in this follow-up email that both Billy and Zachary have been talking about, take some of those the questions, the most common questions, and put answers in there. So thank you both.

So I'm a historian by training, and every time I get to talk to archivists, I learn something new and exciting. I've been talking to them for 25 years, but I'm just, I just admire so much your ability to think big picture, right, to think about what are the materials that are available, what are the materials that we want to preserve, and who are the different audiences that would use them.

And so, Jana Bertkau has a question that's one close to the one that I was sort of thinking to myself. And how do we know, as we're doing this work, which documents to keep and which ones to toss?

And let me just give you some examples, right, so at... So I grew up in the Pilgrim Church down in Duxbury, Massachusetts, a great UCC congregation, and in the 1970s, they did a cookbook. They published a cookbook through the church. Is that something that should be kept, or is that just, you know, it's a printed thing. It's not handwritten. Should that be saved?

Should, you know, the bulletins from last week be saved, or should we only save bulletins from 100 years ago?

How do you kind of decide what are the things that should be saved, and what are the things that don't need to be saved?

BILLY: Zack, take it away.

ZACHARY: Oh, I see what you've done there.

This is a really good question. This is a really complex question, and the answer, the answer I'm about to give is gonna sound really vague and really hokey, but bear with me.

The records which you want to keep are those which tell the story of your community, and your church, and your mission.

And by that, what do I mean? By that, what I mean is that... so, this is getting a little bit into the weeds of archival practice, but one of the things that we do when we look at a collection is that we assign "value."

The way we use "value" as a word is really different than the way the rest of the world uses it. But for us, it essentially means it has a use for someone to use in some case.

That could be historic value: it is the signature of Benjamin Franklin.

It could be genealogical value: it has information that speaks to the heritage of someone calling in asking about their great-great-grandmother.

It could be administrative information: something that tells us about the mechanics of how, in a given point in time, an organization operated.

And the way I'm describing this is gonna sound like a lot. And it kind, it can be, which is why this, our broadness in how I've defined this, does need to be tempered by capacity and space.
If you have incredibly limited space to keep records, your Sunday bulletin is probably a good place to think: okay, this isn't, this is a form document that only a little bit changes every week, it isn't the text of the sermon every week, it isn't... It might say a little bit about what's happening in a community at a given time, but for the amount of space that keeping your weekly bulletin in a box versus how much value it might have to someone say in 100 years trying to figure out what's going on in your church?

Your annual report is probably gonna be a better version of your Sunday bulletin for that kind of example.

So yes, in a perfect world, we are, you would keep that Sunday bulletin. We're not living in a perfect world. It's a messy, messy world.

So really focus first on what documents tell a story.

That contract to that contractor isn't really telling a story. A lot of financial records that you're only, that the IRS is only asking you to keep for seven years, they're really only asking to keep for seven years because after that they're just, they're not useful.

So that's, that's gonna be my really vague, hokey answer I think.

KYLE: And you've given us the right lede for two great questions: one from Debbie Morehouse and one from Katherine Newman.

The IRS requires seven years of keeping records, so what financial records, if any, should be preserved longer?

And just to add to that, so Katherine asked, some records are confidential, right, there are financial records that have confidential information on them. At what point do those become

part of the archives and potentially available to anyone who goes into the archives to look at them?

So what do you do with the finances?

ZACHARY: You want me to answer this one, too, Billy?

BILLY: I think you have more experience on this one.

ZACHARY: Okay, so I will admit, I added the IRS comment because I knew this was leading into this question.

For financial records, for example, when we collect records of a church, we're only, we always say we're not going to collect the financial records from the last 50 years.

And that, that's, to a degree that is a confidentiality issue that is a, that is an issue of a lot of financial records have things like checking accounts and bank numbers on them, and we, we don't want that, that's, those are, those are types of records that we don't want.

For you as an individual organization, it's always gonna be a little bit of a thing, trying to figure it out, it's always gonna be a little bit of a gray area.

For financial records in specific, there is honestly a lot that you definitely don't need to keep longer than those seven years. Follow those IRS guidelines. Basically if the IRS isn't interested in them after seven years, an average researcher off the street is also probably not gonna be interested in them.

What the average researcher off the street is gonna be interested in is larger picture financials, the kind of financials that you might find in your annual report or if you have a, or if you kept a ledger in either the past or presently. Those sort of, like, larger, grander story financials that tell a picture of what's going on in the church and community.

Those, yes, keep those records. But the tax document, that's not gonna be valuable. The 20 pages of various documents that you have to provide to insurers or that kind of thing, that, those are also, I think, have a seven-year limit on that type of material.

I think seven years is pretty common for most type of financial records, and for the most part, things that fall under that, yeah, follow that advice.

BILLY: Also, if I, I'll jump in a little bit here. When it comes to sort of the schema that Zack was discussing, you know, it might be helpful for your individual situation to just collate all of those things together.

Like, if you, if you're worried that, oh we have some bank information over here, donation information over here, it's okay to just bring those together and then have something on that box that says "confidential."

You know, like I said, don't... something I hope we get across here is, if you can't... don't overthink it. If you're, if you're, you know, getting in your own head about it, try and find the most simple solution, you know. If you have to sort of play around with the schema a little bit to make sure that you're not giving away any private information, do it.

That's, you know, as the accession archivists here, you'd be, you wouldn't be surprised how much Social Security numbers, bank information, that we sort of, come across, because the people giving it to us don't even realize they have it.

So if you can get that stuff together, it'll help everyone.

ZACHARY: Yeah.

KYLE: And very quickly pointing out that when we do come across that information what do we do with it?

BILLY and ZACHARY: We shred it.

KYLE: So keep in mind that if you choose to have us as your repository for your church's records, we hold very strict standards about the type of information that we collect here.

Financial is one part, churches don't often have a lot of medical information, but that's another area that we are not collecting. It is not an appropriate place... we are not an appropriate place for that material to be, and we, we do not keep it.

So a couple questions here about format, and also I think getting to, you had alluded to staples being somehow an enemy of the archive. I think you need to explain what your animus against staples is.

So, Anne Hoenicke asks, any suggestions on how to store oversized documents? Blueprints? Posters maybe from, you know, the Harvest Festival, things like that?

Another question about if something's in three ring binders, should they be put into folding, you know, into files? Is there, is metal the culprit here?

And then, a question about materials that are older, that, where the ink is starting to fade.

And, you know, what do you do for things that seem like they maybe are starting to break down?

So, large format, metal—is it the enemy, and what do you do when there might be some fading, some, you know, materials breaking down?

BILLY: Okay, so, the thing about the staples... this right here is our handy spatula that helps me remove many staples, and it's because they get rusty, and they can start to deteriorate the paper. And also just from, like a storage format, when you have a bunch of staples together, you get these big bulges, and that starts to impact the space. You're just losing unnecessary space.

On the three ring binder, I would recommend that you get them out of those binders and put them into folders.

Just, you want to save as much, every, for a lot of your churches, every inch is gonna count. So whatever you can do to minimize that space is gonna help you. If that, as something to note, if that three ring binder contains information on the cover, make sure you, you know, get a scan, a photo, anything of that information: be it the dates that were on it, something like that, and just add it into the folder that you make.

The question on, I see there's an additional question on microfilm. As someone who deals with that a lot, there might be instances where it's still worth doing, but I would highly recommend that you stop using it.

Microfilm requires specific software, specific hardware, and I don't know if anyone here has used it recently. I use it, you know, often with our patrons visiting. It is not easy to use. The information is not very well captured.

And that sort of gets into what Zack was talking about where 30 years ago plus, it was considered, you know, the cutting edge of technology. And now it's sort of... no one really knows, very few people know about it, and there's not many people to protect it. We really only have, like, one company in Boston that does that sort of work, things like that.

So, I'd recommend moving away from that at all possible. The ones that you already have, absolutely hold onto them, preserve them, but don't see it as an avenue for the future. And then, I thought, what was the last? I think I got everything?

KYLE: Large format.

ZACHARY: Oh. Yes, so, fun thing about banker's boxes. They are appropriate for both legal size and letter size, depending on how you orient the box. That is, that is why they are the shape and size they are.

So if you have legal size material, keep all of your legal size material together, and put them in legal size folders, and use the long ways side, way of orienting the banker's box, and there you go for legal materials.

Materials that are larger: posters, blueprints, basically large flat materials? The best practices route is to use what are called "flat files." They are metal storage cabinets that have pull out metal shelves.

If you don't have access to that, best way might be to find, like, large sheets of stock paper like you might find in a craft store or something and interleave that kind of stock paper in between these posters and have like a table, or a shelf, or even possibly standing--that's not ideal—but to have them gathered. They'll be in between the heavy stock paper, so that'll help give some support to all of the documents so that they won't in on each other. And that way is sort of a quick solution to the problem of these really oversized really, really large materials.

KYLE: So let me jump in. We're almost at two o'clock. We've had 31 different questions asked in the Q&A period, and the beauty of Zoom is that it preserves it all.

So we... and it looks like everybody's leaving their name on here. So we're going to follow up with all of you with answers directly to your questions. And as I said, we're going to pull out the common questions, and we'll share them in the follow-up email that goes to everyone who registered, so that you're not gonna miss out on information.

There are, they're really wonderful questions in here about what to do around anniversaries, a great question about what happens when there's been some disagreements in the church and people have said not nice things about each other that's preserved in the records, if those, if those should be kept? Short answer, yes. Saying that as the historian because that is part of a story. You don't want to censor the history of your institution.

You can, and I want people to keep this in mind; if you give your materials to us, you can put materials sort of in what we might call embargo. So if there are, if there was a contentious period, and you were afraid, you know, you wanted to wait 25 years or something, we don't want to do that a lot because it keeps people from accessing the larger collection. But there are ways that we can deal with sensitive material like that.

So, ref@14beacon.org is our email here. That will go directly to Billy and Zack. Please use that with any other questions that come up.

All of you who are registered, having given us your email, you're gonna get a follow-up email from us.

Final question guys: the church, unfortunately your church is closing, and you spot somebody putting historic records near a trash can. What do people do?

BILLY: Please go over to that, your trash can area, please pick them up, and then take them away from whoever's doing that work.

I will say we, as the reference archivist again, the amount of times that I have heard about records being thrown out wholesale is very concerning. So if you can do something to fix that, that would, please do it.

Save it. Even if you have to... Call us. Save it. Leave it in your van, your car, and then call us.

KYLE: When in doubt, call the Congregational Library & Archives, please.

BILLY: We're here for you.

ZACHARY: As Billy had said earlier, even if it turns out we are not the best repository for a particular set of records, we are happy to work with you to find that best repository. Remember that's your state library, your local history organization. We are happy to work with you to find the best solution for where to store your records permanently.

BILLY: Absolutely.

KYLE: Everyone, please be well. Please join us next week for Westminster Confession at 375, and please, you know, we're gonna send around a survey. As Billy said so eloquently at the start, we are here as a resource, and we're gonna keep doing these programs. We'd like to know what kind of programs you would like: in-person workshops, more Zoom, videos, anything that you can help share with us that would be helpful for you doing this work and for us doing this work is great.

So, please, don't be shy. Reach out. Let us know. Take care, everyone. Thank you so much.

BILLY: Thank you so much everyone.

ZACHARY: Thank you, everyone.

BILLY: Have a good one.

ZACHARY: Have a great day.