PROTECTING AND PROVIDING:
A GUIDE TO REFERENCE SERVICES FOR CHURCH COLLECTIONS

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KYLE ROBERTS: My name is Kyle Roberts, and I am 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 "Protecting and Providing: A Guide to Reference Services for Church Collections."

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 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 our digital archive with more than 110,000 images, many drawn from our New England's Hidden Histories project.

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

Please do check out our website, congregationallibrary.org, to learn more about what we do and for news and forthcoming events.

At the Congregational Library & Archives, we are committed to supporting churches struggling to engage in effective records management.

From reference requests to in-person feedback, the archivists at the Congregational Library have long recognized the desire among churches to better understand how to steward their church records in order to maintain the memories and mission of their church community. They also recognize the challenge of really not knowing where to begin.

So thus far, we have sponsored four programs in this Church Stewardship Initiative series, all of which can be found on the library's YouTube page.

Now, without further ado, please let me introduce our 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 Congregational Library, Zachary worked at the Bellamy Faraday 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, audiovisual preservation, and archives management.

Billy McCarthy graduated with a Masters of Library and Information Science at Simmons University, also with a concentration in Archives Management. Billy started working as 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. 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.

So I'm going to invite Zachary to start his video and join us to kick off our program today.

ZACHARY BODNAR: Thank you so much, Kyle and I want to once again welcome everyone to "Protecting and Providing: A Guide to Reference Services for Church Collections."

Together, we will be presenting on the importance of having a defined reference policy at your church, even if you never intend to open your archives up to outside researchers.

After today, you'll have a blueprint for how reference services might be handled at a church, as well as some guidelines for how to think about what services your church can reasonably provide to various patron communities.

So what are reference services? And why should you and/or your church care about providing reference services? And who would you even be providing such services to?

Hopefully, after this program, we'll have some answers for you.

But first, as is often tradition, some definitions. Once again, we are drawing on the Society of American Archivists own dictionary to provide some basic definitions for a few key terms that are gonna keep on popping up from time to time in today's presentation.

First off is "accessibility." This is a term that has a lot of meanings of various definitions for both librarians and archivists, but within the specific context of reference services, it simply relates to the permissions and policies that dictate who may view what types of materials.

"Reading room," then, is the space in which patrons will use archival materials. Even if that space isn't necessarily a purpose-built room, it is important to designate a physical space as the reading room.

"Reference" is a service offered to help patrons find and/or retrieve the information you are looking for. Reference can take place in person over a phone, through the mail, or over an email.

And for a final definition, we have request. A "reference request" is the question asked by the patron as part of reference services, and a request is fulfilled either by the retrieval of a physical item, such as an archival manuscript, or the retrieval of a piece of information. For example, answering a question based off of what you're seeing in a, in a manuscript document.

These are all words that you're likely to hear Billy and I say multiple times today, and I hope that by having these definitions right out front, we can allay any potential confusion.

Reference services are an important way to make your church's archive available to more than just those who are already tasked with directly stewarding your church's archive.

While the preservation and security of your church's documentary history may be your chief goals for creating and implementing an archives program, we also believe that it is worth having set the policies related to how you are making your records accessible to your church staff, community, or possibly even the world at large.

Even if the decision is to ultimately limit accessibility to a small group of people, perhaps just immediate church staff, having reference... having a reference policy in place will help to ensure that you can ensure the safety and security of your archives whenever that small group of people use the materials.

While reference services and the policies and procedures in place to support reference services outwardly appear about accessibility, they can also... and that is true… They can also be said to be about the protection of your archive.

Reference service policies are ultimately aimed at ensuring that your collections are safe and secure, not only when they're sitting in a box on a shelf, behind a locked room, but when they... but that they are also safe and secure when the town historian needs to see parish meeting minutes from 1830, or when a church member wishes to see their great-grandmother's membership record.

Having uniform policies in place standardizes how reference services are done and ensures the equitable and fair treatment of all who need to or wish to use the archive. And more importantly, ensures that everyone is using the archive in a way that protects the contents of the archive.

The policy you should create should have buy-in from all of the major stakeholders of your archive. That may be the archives committee, if you have such a formal committee. or could also be the church historian, office admin, minister, or lay leaders.

Those who regularly use the archive, deposit materials into the archive, and work with the archive to ensure its preservation will be your main stakeholders. And it is these stakeholders who should have the buy-in for any policy that is set forth regarding the accessibility of your collections.

Once again, and we'll probably reiterate this a few times, I want to reiterate that the policy may be as restrictive or as open as you are comfortable with. Unlike a publicly accessible library such as ours, you don't necessarily have a duty to make your materials available to anyone off the street who wishes to use them.

Any policy that you set should be tailored to the needs and realities of your church's specific community. In order to determine the needs of your community, you also need to think both about who will be using your archive and who might want to use your church's archive.

Every church and every community is different, so there is going to... isn't going to be a universal list of who may or have a need for the materials held by your church.

But some questions you might ask yourself to help along with thinking about who these people might be...

You first ask, who is currently using the archive? Then who has previously asked to see the archive? And finally, who might reasonably want to use the archive? From these questions we can begin to extrapolate some ideas of who in the community will have a use for your archives.

Of course, if you have any data about who is using your archives, please use that too in asking these kinds of questions. And if you're not currently collecting that kind of data, no worries. But sometimes it is useful to have that kind of data. Also, it helps flesh out your own policies.

Looking at our own experiences here at the CLA, I've added to this slide a bit of a short list of some potential patron communities. These communities come from within the church's staff, the church's membership, the wider town community, and finally a community of outside researchers. I'm sure that this isn't an exhaustive list, though, and that your own unique church communities will have different sets of potential patron communities.

Identifying what your church can offer... With a list in hand of who your patron communities might be, the next step is to decide what level of access, if any, you can provide those communities.

Once again, we strongly urge you to not overextend the capabilities of your church's staff and volunteers. Any policy that you put into place that answers the question of accessibility should be tailor made for the capabilities of those involved with the archive. Don't do more than your church can handle.

Foremost is to determine the who and where of providing reference services and accessibility to your collections... Who it is among your church community and staff that would be able to work with the archive and provide reference? What days or times are those people able to staff the reading room? What will your reading room be? What is needed to make that space available to potential patron communities? Does your church have a library with open hours already, and how might an archive fit into that schedule? These are the kinds of questions you will need to be asking yourself among your primary stakeholders in order to identify what your church can offer to patron communities.

I do want to emphasize here too, that we do not wish to discourage you at all as you think about... think through some of these questions. Even if the only capacity you have is for one person that is available to answer questions by email one day a week, maybe every other Thursday at... between 2 and 3 p.m. Even if that's the case, that has still vastly increased the level of access for possible patrons over no access whatsoever. And that is something to be lauded.

We don't expect you to make and staff a reading room like we do here at the CLA. That's not what this program is.

But to instead encourage you to think about accessibility and how you can help to protect your collections by defining accessibility and putting in place policies and procedures that are uniformly administered by the archives committee, church historian, or whoever is in charge of your church's archive.

Now to sort of get into much more of the meat and the potatoes of this program, let me hand it over to Billy, the CLA's Head of Reader Services, who will be talking much more in-depth about ideal reading room policies and the ins and outs of fulfilling reference requests.

BILLY MCCARTHY: Thank you so much, Zachary, for your excellent introduction.

Now that some definitions and preliminary explanations have been touched on, I want to take the conversation to the next step and get a bit more detailed about reference services. As always, it would be impossible to cover everything as in-depth as I would personally like, but I'm gonna do my best to give as much information out to you as possible.

I have been working in reference services for a little over five years now, and every day I am learning new and more effective ways of communicating with our patrons.

The CLA has been and will continue to be a resource for all churches. So while we encourage you to do as much independent work as you can, we will always be open to answering broad questions when you have them.

I want to briefly start by sort of circling back to inventories, which was the subject of our last program and serves as a nice lead in to the more in-depth conversation I'm going to have with you today. If you haven't had a chance, I would recommend going back and listening to that program when you can.

When you have completed an inventory, we really suggest making it available in some form to your wider audience or church community.

We receive hundreds of reference requests per year here at the CLA, and several would have been easier to resolve by getting an understanding of the status of a particular church's records. It can also save you time by having that information out in the open and freely available for your community.

If your church happens to be running its own website, we would suggest adding a page that's either titled "Archives" or "Church Records," or you can just add it to a section to a preexisting page, whatever is easiest for you.

I would add here that even if your church does not yet have an inventory, it would be a pretty good habit to have a page on your website that describes the status of your church's records, even if the answer is something that says you know, our legacy records have not been inventoried or processed in any manner, and we sadly cannot allow the records to be used at this time. Having something like that indicates that you're, you know, A: not being able to provide reference services right now. But it also makes it clear that you are taking the safety and security of your collection seriously.

In the years that I've been working here at the CLA, I have noticed a trend of churches foregoing regular web pages in favor of Facebook business pages, since they are easier to manage and free. Those business pages actually allow you to upload PDF documents. So you can easily add your inventory onto this page for ease of access.

No matter where you upload your inventory, as always, remember to make sure it is free of any confidential information.

Now that I talked just a little bit about the publicity of inventories, let's shift gears to the common types of questions your church is likely to be receiving as you become more open to reference services.

At the very top is going to be genealogy-related questions, which we also refer to as vital statistics. These are your baptisms, marriages, deaths, admissions, dismissions. And all of these together help people track their family's movements, complete family trees, or help them complete applications to groups like the Daughters of the Revolution and many more.

When sharing that information, restrictions should always be kept on more recent information. Unless the person shows identification proving they're the ones asking about their own information, you should not share information of individuals within the last 75 years, which would be 1949 as of this recording.

If it is in relation to someone who has died within the last 75 years, you can share that information once you have confirmation that they have in fact passed.

Like I said, vital statistics are going to be the largest sets of questions you receive hands down, and they're the largest that we tend to receive as well. And from there, the other sections I'm gonna touch on today are relatively equal across the board. One's not really that much bigger than the other.

The first set would be ministerial records. These can be records that include meeting minutes, sermons, correspondences, diaries, journals, or records that relate specifically to their calling or departure.

Linking back to vital statistics, for some people, it can be really helpful to know what their family members might have been hearing from the pulpit. So a better sense of that minister and their thoughts goes right towards that.

Next up would be what I kind of call the general histories on a variety of subjects, time periods, or individuals. For instance, what did the particular church do in response to movements like the Civil Rights or the World Wars? These questions are more likely to come from historians, from those on your local level, all the way up through PhD students and professors.

Each of your church's history, both the good and the bad, can help illuminate stories of not just your community, but maybe your state and even the country overall.

Finally, I want to mention building records, since I've personally noticed quite an increase in questions on the subject. Most of that increase has come in the way of the National Registry of Historic Places. But even besides that, there just seems to be a general... more general interest in church records on architecture overall. But yeah, it depends.

All of this to say that your records can be used in ways you might not have ever even thought about before. And I think part of that is just really exciting for people.

So Zachary briefly touched on some of the factors and answering reference request questions online or through the phone, and I just thought it would be good to add some... a few of my thoughts.

First, again, you can only do what you are capable of, and we recognize that many of you just might not be able to do this because of time and personnel constraints. The goal here is to provide some overview for those that have the capabilities, while also giving an idea of what it might look like while protecting and securing your most important church records.

Time is likely going to be the biggest factor. And even here at the CLA, we set limits on the time we can provide per question. Since we have no dedicated researchers on staff, the staff have tasks that will fall outside of reference services, and priorities and deadlines will obviously change day by day. Here we institute a 30 minute limit to the help we can provide different patrons before asking people to set up appointments and come in and visit.

Put another way, I recommend viewing the work of reference services as one based on facilitation, more so than research.

The next factor to keep in mind is proper removal and return. For those of you that completed an inventory and can maintain some sense of location, it is imperative you maintain the hard work that's already been done. When you take something out of its proper place to answer a question or let someone view it, return it as soon as possible and right exactly where you found it. If your to-be-returned pile, so to speak, starts to get too large, you risk messing up the order. Or in a worst case scenario, something might go missing or be misplaced.

Finally, staff sizes are obviously gonna vary significantly between your churches. It is well within your right to simply just say no or ask people to wait weeks or even months for an answer.

Keep in mind that doing reference services for your churches is an added service you are providing for free. While it may be tempting to err on the side of being helpful, at the end of the day, your focus will likely be elsewhere.

You know, while I'm talking really only about virtual conversations, I do want to remind everyone that only specific staff members should have full access to the church's collection of records. I recommend that all of the staff with the minister gather together, and sort of write out and codify who has access to the records, and make it clear that those are the only ones and everyone else needs supervision and permission.

Even those with the best of intentions should never be allowed unfettered access as the chances of something being misplaced or taken are simply too high.

Now that we talked a little bit about sort of online interactions, let's move into physical appointments and reference services.

The first step you're gonna want to decide is that when question.

Based on my experience working with churches of all shapes and sizes, I think the best way to do this is to have a very tight restriction on when the archives are available. Two examples could include appointments from 1 to 3 on Thursday afternoons or 9 to 10 on Friday mornings.

The reason for doing this is that you provide a consistent window for your staff to focus on reference services and those that want it... wanting to come and visit, will need to work with you and not the other way around.

Any available window is better than nothing in my opinion. So even if you can only spare a 30 minute block a week every other week, I would very much advocate for doing so.

Reference services do not only help the patron who's coming in, but they also help your church better understand itself, the local community it surrounds, and the history of both.

Someone who comes in to look at a particular time frame or subject can end up finding moments that have otherwise been forgotten to time. These moments create a link between the past and the present, and I believe the more that is known about our shared history, the better we all are overall.

So here the CLA, we're what we call a closed stack, meaning that individual patrons are not allowed to enter the area, as Zachary mentioned, like one would do in a public library. As I mentioned before, I think every single one of you should implement this exact same system in the name of security.

We've discussed previously the idea of purchasing some form of a recording camera for the space your collection lives in, and these ideas share a very similar principle. The more people with access, the more likely you're gonna run into an issue of missing or misplaced material.

You know, I know of several churches where members of the community either had permission or took it upon themselves to actually remove original church records right out of the church and into their own homes. While many of the situations that I'm talking about do have nuances to them, I really think this should be viewed as absolutely out of the question unless a catastrophic event has occurred, such as a fire, or a flood, or something similar.

The CLA has been by appointment for the last couple of years, and as of this recording still operates on that basis.

As a result, we came up with an FAQ page that explains our system and how to set up appointments. This document will be made available in a PDF format following this program for those that are interested and is also directly available through our website.

You want to include on this this policy some of the following information: dates, times, contact information, sick policies, an entrance policy, and anything else deemed appropriate.

For our own personal policy, we are open Monday to Friday with two appointment slots per day: an AM slot, which goes from 9 to 12, and a PM slot, which goes from 1 to 4.

We also have a public calendar available for people to view, which indicates when a slot is and is not available. But we always encourage people to email us directly to check if they see fit.

We make sure to mention that appointments are only for the person asking, and if they want to bring anyone else with them, they must ask at that time.

We also make sure to specifically state something that sounds quite simple, but if you are sick, please reschedule your appointment.

Finally, we include a little bit of information about how to actually physically enter our space, since our building does have a kiosk system at the front door.

Our appointment policies again, as you've probably already noticed, are written with our specific situation in mind. So if you want to use ours to create your own, obviously feel free to add or remove parts of it that fit your situation.

We're now on to what I would call our reading room policies, sometimes also called reference desk policies. The words can relatively be interchangeable. They mostly mean the same thing.

And you know what exactly are the points of these again? Why are we talking to you about them?

They go a long way in protecting your church's holdings, providing the best possible environment for your patrons. They provide a set of standards for your staff who may not have the library or archival knowledge, and sort of serve as a guide for visitors who have never engaged in any kind of research before.

Policies are written so everyone can understand and follow them. And so our policies here at the CLA, I would say, fall into three top level topics.

The first are policies for when visitors arrive and what material they can and cannot have with them. The second are policies that are specifically about working with our material themselves. And third of the policies are related to arriving, leaving, and cleaning up. As with our appointment policies, a PDF copy will be sent around after this talk and they are also up on our website.

So I'm gonna talk... gonna go through our policies. And I do want to note I've slightly adjusted them to better fit the context of this talk alongside adding some notes and comments on why we have specific policies.

So our policies start with the following statement: The following reading room policies are in place to protect the holdings and provide the best environment for our visitors. Violating any of these policies can result in removal from the reading room. Additional or severe violations may result in being banned from the premises."

So got that out of the way. So let's start breaking down these individual topics in the column on the left, starting with technology.

First up are computers. Our policy states that all visitors are welcome to bring in a laptop or tablet for use in the reading room. The CLA has several outlets available under our reading room table. We also have an additional desktop for visitor usage. And that computer is not capable of being used to print anything, but you are welcome to bring a USB stick for transferring documents.

So computers... at this point for everyone, they should be so commonplace that it's actually pretty unusual for us to have someone not come in with one of them. I'm gonna guess that none of you have a spare computer available for usage, but I would suggest actually noting if you do have outlets available as it can help people prepare by charging their technology in advance.

Next up would be cameras and cell phones. Our policy states that visitors are welcome to take photos of our collection with a camera or cell phone if the flash and sound effects are off. All phones should remain muted or set to vibrate. If you need to take a call, we ask that you step out of the reading room and into the hallway.

So most people in your space are gonna have a phone, and that's gonna be the way that they take images. It's been a really long time since we've actually had people bring in cameras for taking photos, but it's certainly happened in the past. And again, that's because at this point, cell phone camera technology has come along so far, that a camera's kind of, not entirely obsolete, but for the work that your patrons are gonna be doing, regular cell phone images are more than enough.

So the next one, the most recent addition to our policies would actually be scanning devices, which we do not allow in our reading room at all. All images must be taken by a camera, tablet, or cell phone.

We actually added this policy recently because someone asked us to bring through what I call a pass through scanner, which would have severely jeopardized the safety of our collections. So we added it afterwards to sort of cover all of our bases.

In your own churches, you'll probably find you have to modify the policies to account for situations not yet codified in our own policies. And there's absolutely nothing wrong with that at all. And we highly encourage you to do so.

Moving on to our next section, which is research materials.

Pencils and loose-leaf paper are welcome in the reading room. The CLA has also provided, or can also provide paper and pencil if needed.

Pens, markers, notebooks, and binders of any kind are not allowed. So with the pens and markers, I hope this is pretty obvious. They are permanent and can cause irreversible damage to your church's records. A pencil can at least be erased in a worst case scenario with relative ease and overall just the best of the options.

Notebooks and binders are something the CLA does not allow that other cultural heritage institutions do in fact allow. But we've implemented this restriction in order to provide maximum security.

It can be quite easy for someone to take a piece of paper and slide it between a page of a notebook or something similar without someone on the reference desk actually seeing it. While we do have cameras in our reading room, a lot of our material contains dozens of pages inside a single folder. So something can be taken without us even knowing it was ever missing simply because we didn't know it was there in the first place.

We also feel it might not be the most appropriate to sort of review patrons' personal materials on their way out the door. So this restriction just sort of removes that problem entirely.

The next section, which would be personal belongings.

The CLA has lockers available for visitors who arrive with backpacks, bags, and laptop sleeves. Any items other than the aforementioned laptops, paper, pencils, cameras, and/or cell phone must be placed in those lockers upon arrival and can only be removed when you take a break or when you leave. Our lockers are locked and keys are only in the possession of the staff.

Outside books are not allowed in the reading room and must remain in a bag or stored in the locker. If a visitor wishes to use a personal book for some kind of comparison's sake, they must ask permission from the staff members to do so.

So this step is gonna be probably the most specific to your own space. You might... so you might not be able to keep a visitor's personal belongings separate from where they are sitting. But we implement this because again, like with notebooks, it can be relatively easy to slip an item into a bag without someone noticing. So we try to keep them as separate as possible. If you have the ability, I suggest you do the same.

Our fourth section would be on food and drink.

So at the CLA, all food must remain in your bags or backpacks and cannot be eaten in our reading room. Drinks can be stored inside of your locker, but you must drink them at the lockers and they cannot enter the threshold of the reading room. Also, the library is unable to store any outside food or drinks in something like a fridge or a freezer.

So I would highly recommend for all of you this being basically a zero tolerance policy. Liquid of any kind can cause a chain reaction of preservation concerns that are just not worth risking.

You know, our lockers are actually kept in a separate area of the reading room, so that's why we're able to allow drinks since they remain wholly apart from any of the collections that people are viewing. At minimum, we just ask... you know, ask the patron that's there with you to step into the hallway or as far away from your collections as possible. Again, it's better to prepare for the worst than anything else.

The last section I wanted to highlight sort of relates to working with material.

First up are gloves. So gloves have been kind of a topic of discussion within the information science field for many, many years, and you may personally find that different people hold different views on the topic.

For the CLA, cotton gloves are only required for when you are handling photographs and are not needed in any other scenario.

There are some older items which we've touched upon in previous programs that have what we call red rot, which is a degradation process for vegetable tanned leather, most often found on the spines and the covers. Red rot won't cause any permanent damage, but it can be pretty off putting as your hand will kind of turn this orange-ish red. So if you're not used to it, again, we offer latex gloves for people in that situation. But you're not going to cause permanent damage to your hands or to anybody else.

On supervision, circling back to something we've already mentioned a few times, which is not to let patrons have free access to where a collection resides. A supervisor should be the one pulling and returning the material a patron is asking for.

Part of this is also being sure they are being fully supervised while working with the material. How the policies have been laying out, they don't mean anything if someone can circumvent them by not being monitored.

For certain physical usage, we have, and most likely do as well, have material that might be considered more fragile than others, which could impact their overall usage. CLA staff can provide necessary tools such as book cradles in those particular instances. Here at the CLA, we also have facsimile copies of particular material. If the originals are in a relatively bad condition, the staff can choose to only allow the facsimile copies for usage.

So don't fret. We're not expecting any of you to run out and spend money on book cradles, or weight snakes, or anything like that, as they quickly become quite expensive. Until you have better preservation capabilities, which we have tagged as a future program, we would always advocate erring on the side of caution. Protecting your collections is more important than anything else at the end of the day, as far as I'm concerned.

And the very last thing I want to discuss is privacy concerns.

Here at the CLA, we strive to remove sensitive material such as Social Security numbers, bank accounts, medical records, human resource records, or other potentially invasive information. Visitors are not allowed to reproduce these records under any circumstances and should immediately inform staff members if they encounter any.

So even as professional archivists, you know Zack and I cannot catch every piece of confidential information that resides in the records we hold, and neither can you.

When we do find something filled with confidential information or when you do as well, don't allow anyone else to look at that information anymore. And be sure to flag that that information contains sensitive information. Update your inventory to indicate it has sensitive information. And also make steps to remove said sensitive information that you no longer need to keep.

So that was a lot of information that I just gave out to you at once and that you've had during this program. But I hope you can use what we've said today as a basis for starting reference services for your own collection. You know, I truly believe this work can yield fantastic results for everyone involved.

And even if it takes time, I ask that you consider charting out a timeline for making your collections available to others.

By following some of the policies we've used here at the CLA, and also incorporating ones that fit for your own situation, you can be sure that you are protecting and securing your collections for the future.

KYLE: Well that was great.

Thank you both so much for sharing your expertise and long experience working with the Congregational Library's collections.

I think one question that sort of comes to mind... and there's, you know, questions are starting to flow into the Q&A box, and I invite others to add their questions there. I think one question that comes to mind for me is, you know, saying something... saying a reading room space might feel a little daunting if you've got a closet, or if you're lucky, you know, one room in the parish hall or somewhere in your church. What's kind of a bare minimum necessity for having, you know, kind of a reading room space. You know, is it just pulling out a table, or, or what?

BILLY: Sure. So we opted to use reading room just because it's, you know, the word you're gonna hear the most. But yeah, it's not...

And you saw some of the pictures of our own reading room. You don't have to meet that level of fancy. I would argue the only thing that really matters is that a staff member has eyes on the person looking at the material.

It can be the tiniest little desk in the world. It could just be a... even a stool attached to a tiny table, even your own desk, whatever you're using.

The main, the main thing to worry about is do not have... do not make it so you're blocked from seeing the material people are viewing. Beyond that, create whatever reading room fits your fancy.

KYLE: Excellent. All right. So we got the first question here. Our church has a small four by six inch paper document from 1889. So this little tyke is going on probably 140 years now. It's the standing rolls of the Central Congregational Church with its creed and covenant from 1880, or 1889. It's intact except for one loose page.

As a church historian, how do I allow people to look through this without the further destruction of this little booklet?

Should I stay present in the designated room?

Do I need to show them how to handle it carefully? Should they wear gloves?

And I'm guessing that this is probably like a lot of the paper we encounter, which is that 19th century highly acidic paper that has way too much tree in it and not enough rag.

So clearly an important document. What's your advice on access?

ZACHARY: Well, you have sort of already started thinking about it correctly.

We would definitely say stay in the designated room with the reader.

Show up... show them how to handle it as safely as possible. Something small like that, probably, it should never be opened, fully flat. Should probably always be open at something of an angle to help with the binding. Should always be handled carefully.

As Kyle mentioned, it is probably that horrible pamphlet paper that turns to dust at the smallest of sneezes in a room halfway across the world from it.

So there's always... whenever handling anything, there is always some inherent risk of minor damage to the item. That is something you need to always keep in mind when handling materials.

If there is, perhaps not this item, but if you do have items in your archive that absolutely cannot be handled without causing actual significant damage, those generally just need to be straight up restricted from general use and only used under specific situations that involve whoever is in charge of the preservation of that item.

And Billy's already pretty much covered this.

But should you wear gloves? No. Especially with something small like that.

Gloves, you lose all tactile function. You will cause more damage holding that item with glove than you will with just straight up your fingertips.

BILLY: I would also quickly add that for a document like that, just take pictures of it. Just take your phone, and just do it once, and just take... you know, you don't need to create perfectly leveled, excellent archival quality images. Just open it up, take some pictures, and you can, you know, there'll be a little, you know... the file size isn't that big.

And just keep it as a single document. You can print it out. You can upload it, and you can share it. You know, if you go the Facebook route, you know, or even if you have a website, you can just upload the images to it. And you have that available for everybody.

And then after that, the only time you need to really handle the original is under specific circumstances.

KYLE: You're reminding me of what our friends in Stoneham did with their, what, 1729 original printed church covenant, which was had a photo taken of it. The document is too precious honestly for too much handling.

But having that document allows people... and in some ways, you know, what you're saying, Billy, is a four by six document. If you take a photo, you can actually blow it up. And it might even be more legible for people, especially those of us whose eyesight is failing as we get older.

So a great question here from Pat Vondal, a long-time friend of the library. Pat writes that she's almost completed archiving her church materials.

Congrats, Pat. That is fantastic. I feel a little zoom emoji or something for that. That's gonna be, have been a ton of work for you.

So she wants to arrange a few events at the church to present the categories of documents that they have, and you know, provide some examples, plus some of the more fascinating materials.

Once the congregation knows firsthand what we have, then she thinks that she should put in place a reference policy.

So what's your advice on events that could be scheduled after church for a viewing or an interaction in the pastoral living room or maybe brought to a ladies monthly meeting? How can she do events responsibly?

You know, how can you kind of, you know, you've done all this work. You want to let the world know, but you want to do it in a way that protects the materials at the same time. And, you know, how much handling of the material should happen in that?

So how do you generate excitement while protecting the materials? And what are some great ideas for how people might, how you might hook people on these?

BILLY: Yeah, so, we've kind of talked a little bit about it.

And, you know, to reiterate, so the easiest one, no food or drink anywhere near at all. A single spilled cup of tea or water is just going to cause unnecessary damage and risk.

When it comes to the handling itself, it does sort of come down to a case-by-case basis. As with the previous question, the most important documents should probably not get free ready access to individuals if they're fragile.

Again, and I know, I can understand for some people, not being able to hold the originals can be unfortunate.

But taking pictures, and scanning certain documents, and making like a booklet that showcases what they're actually looking at, I think is actually a great way to do it.

So in that example, you know, Pat, you could have, you know, a certain document opened. You do the, you do the opening, and then everyone turns to a particular page. You know, blow it up a little bit as needed.

And for some stuff, just because it's old doesn't mean it's super fragile.

You know, as Zack already said, there's the pamphlet paper that falls apart the moment you touch it. I think there's the sort of thin blue paper that is basically illegible at this point in time.

You know, you have to make your calls item by item. But as always, even for someone who believes in a lot of open access, it's always better to err on the side of safety and security than anything else.

ZACHARY: It is not uncommon that the most stable of paper is the 18th century paper rather than anything from the 19th or 20th century.

KYLE: So both of you have extensive experience introducing people to our collections. What turns people on? You know, what do you see people get excited about? What might be some ideas for how Pat could think about either themes or types of material to bring out?

ZACHARY: Visually interesting is one of the first places we go to.

As interesting as a particular minutes of a meeting might be for the content of it, if you were just looking at a volume or just a table full of materials, that isn't necessarily going to draw eyes to the item immediately. Most meeting minutes end up looking like just a bunch of text on paper.

So something that's visually interesting. Something that has images, or drawings of buildings, or anything that's kind of just goes a little bit beyond the text on white paper essentially is immediately going to help draw the eyes to that item.

Another place to go to is if your church has artifacts. Those are also going to become probably much more of a talking piece. Those also something that are more, a bit more easily able to handle.

Photographs, obviously, are a really good place to go. If you are handling photographs, make sure those you are wearing gloves for.

Billy, continue on because I had a fourth thing, and then I forgot.

BILLY: I'm gonna pretend it's the same thing.

Membership directories actually get a lot of good, a lot of good responses, especially with younger audiences, at least what we see here in the library.

You know, we had a group of students from Minnesota, and, you know, we were engaging with them. But we had a variety of items, and some of them were just blank, white pieces of paper. And we had a directory. And one of the kids opened it up and was like, hey, that was so-and-so who ran the daycare. Or, oh, I recognize, you know, Mr. Johnson, who works at the local hardware store.

Like if you can do community connection at its lowest level, you are gonna get engagement that you otherwise just don't get. The sort of humanness of it all really, really resonates with people.

On top of, again, some have photos, some don't. If you have ones with photos, that's obviously better.

But even then, names on a page that can connect to other people they know can really, really go a long way.

KYLE: And there I mean, just to jump in. I'm talking over you Zack, but have a party where you pull out all the photographs that aren't identified.

BILLY: Yes. It's a separate subject, but I can tell you as doing reference services for so long I couldn't even count how many times I think I found something. But I don't know who these people are, and there's no names on the back. So as soon as the people that were in the event are no longer with you, that information is completely lost. So please, wherever you can, I highly suggest you do it.

KYLE: A really good question here from Anna Uhlig saying, can you go over again what is considered confidential information in an archive? And what do we do when we find something that we think is confidential?

ZACHARY: So, confidential probably falls, at least for us... what I'm, or what I really look for these things, into probably two categories.

The first is basically I describe as anything HR related. And the second is anything that looks like a bank account.

Anything HR related, basically materials related to employment or specific details about a person in relation to their employment or their work at a place, whether it's employing or not, is going to be, generally speaking, confidential.

And if we dive a little bit into the future, think about records management. most of those materials aren't... don't need to be kept after about five years after a person is no longer working, or volunteering, or involved in a place.

Especially true for confidential if it has anything that looks like a Social Security number, or birth date, or basically anything that personally identifies someone that a person could theoretically use to steal an identity.

On the bank account side, it's really is just anything that looks like an account number. We straight up should always be shredded. That includes everything from actual bank accounts, to accounts at investment firms and other types of banking institutions, to anything that has credit card numbers on it, or anything that is like a check or looks like a check. Anything like that, where there's a bunch of numbers that probably you can't use to steal someone's bank information, but if it looks like you can, it's just far safer to get rid of it.

BILLY: The amount of Social Security numbers I've encountered in my years here is much higher than it should be.

But joking aside, one thing I will mention is in case this is helps for people, don't feel bad that it got missed. It's just simply, you're dealing with so much history, so much collections. And the whole idea of this program is that it is an acknowledgment that you are starting from the very beginning.

Again, as I mentioned in the talk, even us as processors, I know I've missed bank account information on my first go through. And when returning for specific things, I've noticed it, and I'm like, oh no, and take it right out immediately.

Never feel like you've done something wrong. That's the exact opposite of the entire point of this program.

KYLE: Anna shares with us about two events they did... that she did at her church. One for the 100th anniversary of the building of the sanctuary. So a great anniversary. And then the other the 25th anniversary of when they had had a fire and then rebuilt the sanctuary. You know, so a sadder event, but also a milestone in the life of the church.

She says that they used the edge of the stage in the fellowship hall and displayed newspaper articles, and photographs, small memorabilia, and use small easels to display. And that they used protective sheets as a way to kind of encase the documents and that they had a brunch

with 100th, which sounds absolutely delicious to me. But hopefully the pancakes were kept away from the books.

ZACHARY: They both sound like awesome programs.

BILLY: In case you haven't had a chance, we did a previous talk on storing and storage, and part of that did include the storage for all of those sorts of topics. So if you hadn't had a chance, do go back and take a look because there's some great ideas and options for you there as well.

KYLE: Great question here from an anonymous attendee. So say you're not somebody who wants to use a laptop or lug it around all the time. Can a person bring a few blank pages of writing paper to take notes in lieu of using a laptop or in lieu of using a notebook in our library.

BILLY: Absolutely. Yeah. We have items available for patrons to use that they just return them at the end of the day. Yes, we have all types of paper.

We usually use... We do have, like, a yellow pad, and the reasoning there is it gets returned to us. You don't take it. So you can't really slip anything in there because we're gonna be taking it back.

We have smaller pieces of sort of white paper. Yeah, we have many things available.

I mean, if you want to bring your own couple of sheets of paper, that's fine. That's your call.

And like I said, the idea at the end of the day is we don't go into it believing the worst in people, but we just try to do what's smart and what's safe for the collections that we steward.

KYLE: I think what I'm really taking away from this conversation is that the goal in creating an archive is not just to hoard and keep to a small group of people materials, right?

That if you've done the work to organize and to make these accessible, and that if you see something exciting in them, somebody else will as well. So that, you know, even some very simple steps of accessibility that you've outlined in here can make this meaningful to a larger group of people.

And the more people who recognize it, the more people who will want to support these efforts going forward.

BILLY: Yeah, just even as a history undergrad student who sort of jumped over to information science, the work I see people do here using records that to me seem to not hold the information they're looking for. I've been proven wrong dozens of times.

And as far as Reader Services is concerned, that's excellent. I'm happy to be proven wrong.

And I guarantee that your own records contain information that will surprise you for what you could do with them.

ZACHARY: Yeah, and I said it earlier, and I'll repeat it again. Even if all you can right at this exact moment, offer is really minimal. Really just I can answer an email every other week, that's still a lot more and does a lot to help bring usage to the archive, helps to bring support to the archive, and helps to honestly helps to build the community around your church's history and the many, many stories there within.

KYLE: Excellent words.

Thank you both so much, Zachary and Billy, for a fantastic presentation today.

We look forward to seeing you all soon at another virtual presentation or even in-person in our reading room. And now you've got the lowdown on what you can and cannot do when you're here.