KNOWING YOUR COLLECTION:
HOW TO IDENTIFY CHURCH RECORDS

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KYLE ROBERTS: Well, good afternoon. My name is Kyle Roberts, and I'm the Executive Director of the Congregational Library & Archives. Welcome to *Getting to Know Your Collection: How to Identify Church 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 joining us for the first time, the Congregational Library & Archives is a research... independent research library. We were established in 1853, and our 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, which has more than 130,000 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 check out our website, congregationallibrary.org, to learn more about what we do and for news of 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 and maintain the memories and mission of their church community. They also recognize the challenge of not knowing where to begin.

Thus far, we have sponsored seven programs in our Church Stewardship Initiative series, all of which can be found on our website.

And without further ado, let me introduce our speakers.

Zachary Bodnar graduated with a Master's of Library and Information Science from Simmons University, with a concentration in Archives Management. Prior to his work at the CLA, Zachary worked at the Bellamy Faraday House and Garden Archives, the Vassar College Special Collections, Harvard Law School Library, and Harvard Botany Libraries.

Zachary joined the CLA as an archives intern 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 presentation, and archives management.

Billy McCarthy graduated with a Master's of Library and Information Science at Simmons University, with a concentration in Archival Management. He started working at the CLA through a graduate internship, and was hired full time as an archivist in 2018.

Billy is our Head of Reader Services, helping the CLA's visitors with reference requests and facilitating in-person research. He also serves as the collection manager for the archives, working with the CLA's offsite vendor to protect and maintain the organization's archival records. Some of his professional interests include increasing access, collection management, processing of complex materials, and facilitating research.

And Billy is going to be the one who starts off today's webinar, and I'll invite him up. Take it away, Billy.

BILLY MCCARTHY: All right. Well, thank you, Kyle, and good day to everyone who has tuned into today's program.

So as Kyle has already mentioned, this is part of our Church Stewardship Initiative. And this initiative includes webinars and workshops all focused on helping churches like yours develop their own stewardship programs.

We believe that church communities are uniquely positioned to best preserve the memories of their communities and keep the mission of their churches accessible for future generations.

The Church Stewardship program is almost two and a half years old as of today, and we are now on our eighth online program. We will continue to innovate and expand the topics we cover, so do stay tuned.

If you are not already, do be sure to join our email list so you can hear about future events and our monthly newsletters to see what else is happening at 14 Beacon.

So Kyle briefly mentioned it, but I really do want to encourage everyone to use the new CSI page of our website, which includes information about future programs, enables you to view

previous programs via YouTube, read through transcripts of all of our previous programs, access to free downloadable resources, see answers to some of our most frequently answered questions, and contact information if you wish to send something to us directly.

Church stewardship is not something that can be learned in a day, but we think this dedicated page with all of its resources is a great place to start.

And as always, I just want to take a brief moment to thank all of you for your questions, suggestions, and ideas for future programs. The evolution of the CSI program really relies on your feedback. And Zack and I deeply appreciate all of the very kind words and excellent ideas that have been shared. We look forward to continuing the journey with everyone as the programs continue.

So now let's get started.

Sometimes when looking through your church's collection, it can be difficult to determine what exactly it is that you hold. It is not uncommon to feel daunted or overwhelmed when looking at the full scope of a collection.

The goal of today's program is to provide some knowledge on how to assess, identify, and label the materials in your own collection. We will go through the terminology we use here when identifying records, how to assess records using said terminology, briefly provide an example on how to label records in a consistent manner, then finally talk just a little bit about born-digital documents.

After that, you can start to go back into your own archives, assess what you have, label them in under an appropriate category, all to make things easier for you in the future.

So to start, let's just take a look at the list I have here on the screen. The information in these two lists is actually taken directly from our own collecting categories. We use these categories to determine what materials we do and do not take when working with individual churches. I think this list also doubles as a really great guide for assessing and identifying these various buckets that your records can fall under. This list is one that Zachary and I have been refining over the years.

And while we have tried to be comprehensive, don't be surprised to find your church may use different terminology. That said, I would really encourage everyone here to try and sort of adopt the language we use, as you continue to steward your church's collection.

On the left is a list of record types we typically collect, and these include record books, correspondences, church auxiliary groups, photographs, building records, financial records, ministerial records, and printed materials.

On the right is a list of record types that the CLA typically doesn't collect, but I'm sure all of you have in your own churches. These would include human resource records, service programs, newsletters, published books, realia, artworks, and artifacts.

So from here on out, I'm just gonna briefly look at the various categories of records and provide some thoughts and tips on how I or Zachary would try to identify what category a particular set of records belong.

I want to stress that this really is a skill in and of itself. So it will take some time for all of you to kind of train your brain to think like an archivist. But I want to encourage you. That is exactly what you are doing. Assessment is a core function of our jobs.

So I've written this section of the workshop as something I do really expect you to kind of return to once you find yourself back in your individual archives.

As we go through these lists, the guiding principle will be answering the question, what is this item describing and/or contain within? The answer to that question will determine what type of record you hold and what category it should belong to.

So the first type of records I want to discuss would be what we call record books. When we think of record books as a distinct category, we're usually referring to items that contain meeting minutes of a parish or church, annual reports, records on church committees, and then those vital statistics that we think of usually as baptisms, marriages, and deaths.

While I can imagine this seems like one of the more open-ended kinds of categories, I promise you, they will be easy to spot over time.

So records of the parish and church, as I said, we usually refer to those as meeting minutes, which typically start with something to the effect of, "the group gathered today," or "the following members met today."

Unfortunately, one of the quirks of Congregational records is that each church ends up creating pretty different styles. And the more you work with your own collection, the more you'll start to notice, hopefully, the patterns of the secretaries of your church over time.

Vital statistics are usually presented as just straight lists. And they'll specifically note at some point, usually at the start, if they're baptisms, marriages, deaths, what have you.

Often you might find meeting minutes and vital statistics are separate sections of a single record book. It's very common.

Member directories are similar to vital statistics because they're presented in this kind of huge list that your eyes will notice are just visually distinct.

Annual reports are probably the easiest because they're normally separate documents. Or if they're within other meeting minutes, they'll specifically point out that, we gathered for our annual meeting, or our annual visit, or something to that effect.

Church committee records are similar to the parish and church records in the sense that typically they're gonna call out the name of their committee throughout the volume or pages, depending on the format. Identifying these records may require you to kind of read rather in depth at certain points to find out that exact name. But again, practice will make it easier as you go.

So, the next set of categories I want to discuss now are the church auxiliary groups. So these typically include groups, clubs, or societies that sort of, you know, exist within your church as kind of its own separate entity. Identifying these categories of records usually is pretty easy because the name of the group is either, is used somewhere - either on the cover of the volume, or the first few pages of the volume. It's often quite common that the first few pages will include, like, bylaws, or a statement of purpose, or something to that effect. Thankfully, it's pretty rare for auxiliary groups to share the same volume. But always be sure to double check.

Next would be what I would call a fairly easy category, which is finances. I'm gonna say it's easier because we'll, there'll be numbers in them and math, which you really won't find in any other parts of the collection. The most common financial documents we see would be, kind of, these large ledgers tracking money spent and made. There's really not much tips or tricks here for you. It's just opening a volume and seeing, okay, well, I see all these numbers. What are these numbers describing?

Another section here, a common category would be correspondences. These include between ministers; letters to and from various Congregational societies and organizations; letters to and from conference bodies, local and national; and then potentially correspondences related to specific parishioners.

Physical correspondences are basically always letters. And if you're very lucky, they should be clearly indicated who wrote them, who received it, and hopefully dates. And unfortunately, it comes down to the handwriting. The better the handwriting, the easier it's gonna be to figure that out.

So this is just an example of a ladies aid society with meeting minutes so you can see it there right on the first few sentences. And hopefully you'll be able to find such similar things. And this is pretty good handwriting.

And then right here, finances, cash, right there on the front. The structure of the volume is for math writing, you know, numbers. You got it all right there. So I'd say that's a pretty easy section.

So let's look on to a third category... a third set of categories of records. The first is going to be photographs, which we think of as photos, of course. Either in, you know, Kodak slides, glass slides, and then more rare, but you have like, daguerreotypes and tintypes.

If your collection is particularly disorderly, I might recommend as you find photographs and other, you know, slides and other types of things, to maybe set those aside into their own area. Cotton gloves are always best for handling photographs. However, I do want to caution you that if you have glass slides, they are prone to breaking. So don't go sticking your hand into anything where those are without being sure there's no glass around.

Building records are next, and we usually see these as being things like blueprints, pew plans and deeds, assessor's records, and then anything kind of related to construction or renovations. The good thing about this category is they're usually gonna be pretty easy to identify.

I'm sure all of you have seen blueprints before. They are usually very large and rolled up into a bit of a tube shape.

Pew plans and deeds actually are usually pretty easy because they're gonna state exactly what they are. Especially with older pew deeds, if you have a much older church, you'll be able to identify them by the use of the phrase "know [all] men by these presents."

Records related to kind of construction and renovation can sound a bit broad. But the best example I can give is if your church had a roof repaired or replaced for some reason, the records that sort of document the relationship between the church and the contractor through the completion of their work are what I would count as building records in this category.

Next in the... next would be kind of print materials related to your church and community, which we typically think of as histories, cookbooks, and manuals. We do like to kind of keep these as their own category because we feel they're so distinct from everything else that could be in a church collection. They're almost always gonna be printed in kind of these small little books or pamphlets, and they'll usually have proper titles, and covers, and hopefully the year they were created, and things of that sort.

The last section for this page would be what we call ministerial records, which we think of as covering sort of the personal papers of ministers, letters for calls, acceptances, resignations, pastoral installations, pulpit supply letters, and of course, manuscript sermons. This category will be much easier for you to work with if you actually have a list of the ministers of your church handy while going through the collection, and I may suggest it could be helpful to sort of separate the material you come across by minister, when applicable.

Here on the screen is an example of pew deeds. These ones are particularly from the Old South Church. And like I said, they won't usually... it might not always be in these big letters. But there will be some form of just, you know, this version would be, "to all people to whom there presents." But you will have some... it will look like a more official legal document in most cases. And like I said, you can see by looking in here, it just goes into, this is about pews.

And then one of the favorites of the staff here at the Congregational Library would be cookbooks. These ones are always gonna just be cookbooks. They'll say recipes, cookbooks, something to that effect. And when you look in them, they'll be recipes. And likely your church won't have recipes just lying around that aren't in cookbooks.

This sort of final section are things we don't typically collect at the CLA. But they're gonna be really easy to identify and assess. And again, I pretty much guarantee that all of your churches will have all of these sections within your collection.

So first would be those sort of human resource records. These are kind of those employment files, documents with Social Security numbers or other kinds of personal identifiers, and then any other kind of legal records that are related to employment. I say they're easily identifiable just due to their content. You know, I've looked... when these sorts of records come across your desk while you're doing work, your flags are gonna come right up, and you're gonna be like, oh, these are human resource records.

When at all possible, I really suggest that churches just select one person that's in charge of these records due to their sensitivity. I also encourage, as you come across these files, to put them in an area that is not accessible by everyone on a church's staff, either in a safe, in a locked, you know, minister's office, something to that effect. But do try to keep those separated out from just your plain old meeting minutes.

Weekly service programs, your church newsletters, books, Bibles, pulpit Bibles, and hymnals... I don't really feel I need to say much else about those besides kind of making those clear that these are kind of a category of records.

You should be able to identify a pulpit Bible, identify a hymnal, identify a church newsletter, etc.

For the programs and newsletters, if you have a rather complete run of them, I really do suggest you try to keep those all together in one location or in a particular folder because it can be really helpful, you know, if you need to find something from a particular period, knowing that they're all in the same location.

You know, and then we have artwork and artifacts. These are usually referring to, you know, paintings. Particularly here at the CLA, we have a whole bunch of gavels. Communion silver, metal plaques, baptismal fonts, you name it. Things of that sort.

So the final category I want to just briefly mention is this, what we would call in archives, realia, which basically are what we would call objects from everyday life. These are most commonly seen through kind of posters, charts, maps, banners, and calendars. The word kind of leans a little more on archival science than the others. But as long as you keep those examples that I have, you're gonna be just fine figuring out what these are.

So these are just some examples of newsletters from the Fourth Congregational Church in Chicago. I went with ones that are visually distinct just because I thought they'd be interesting. I'm sure all of you have huge piles of these somewhere in your archives.

And because I mentioned it, the CLA loves its gavels. We have this nice little box of them. So I figured I would just use that as an example for artifacts.

After you identify an item as being in a particular category, I would really encourage you all to kind of put these items into folders. We've had a program that talks about purchasing archivally-sound folders, but as Zack and I have pointed out on many occasions, you have to buy the supplies that match your ability. So if you end up just using plain folders from Staples, that's fine. That's fine for now. The idea is we just really want you to start getting used to folders, used to labeling, and used to that sort of intellectual work.

So to the left, I've sort of written what category the record is in. And then I've put the title of what's being described underneath said category. So for instance, we have Church Auxiliary Group, and then the Ladies Aid Society, and then financial records, and an account book.

You'll notice I also put dates, which we didn't really talk about today. But if you can determine them while going through that kind of identification and assessment, try and put that in there whenever possible.

And then the least important for right now is if you've already started using boxes, and you've started ordering things together within folders, it can be helpful to add a kind of box and folder number.

If you were here during our *What's in a Collection?* workshop, a lot of this is gonna be a bit of a rehash, and I encourage everyone to go give that one to watch after this today.

Identifying and assessing records really is the first steps in our jobs as archivists when processing collections. It will take some time for all of these suggestions to start to click. But once they do, this entire process is gonna become second nature to you. I promise.

If I could end with just one little small suggestion for those that are still feeling a little confused, the next time you're in the collections in your church, replay this section. Grab one volume, grab one item, replay it and see if you can figure out and then eventually learn, okay, this belongs in this category. Again, the more you do it, the easier it's gonna be.

I'm gonna go ahead and stop, and now let's take a turn to the digital with Zack.

ZACHARY BODNAR: Thank you.

I'm here to cover some fairly basic digital assessment and preservation tasks, as well as some recommendations for how to organize and name files held in your church's archive.

All right. I also have a quick disclaimer. I only have access to Windows systems, and I'm not super familiar with Mac systems myself. So while a lot of what I will be talking about today is system agnostic, there may be some screenshots and instructions that are focused specifically on Windows systems, as those are really all I could have access to for this. Specifically Windows 10, though I don't think Windows 11 has made any significant changes to the ways its files are handled, or organized, or visually displayed.

To start, most of the information Billy has provided applies to identifying the content of the digital files that you may have in your church. So I will instead mostly be focusing on the identification, assessment, and organization of the files themselves as they exist on your computer.

Most files can be organized into one of four categories.

Documents, which are things like word processor files, presentations, Excel sheets, or basically anything you could imagine yourself printing off onto a letter-sized paper.

Images are, these are your photographs, your graphics, and pretty much any other typically static image, though technically GIFs are in this category.

Video is most of your moving image stuff, and it's usually accompanied by audio as well.

While your audio files are just specifically audio, no accompanying image or video.

There are plenty of other categories of files that you might run across: databases, executable files for software programs, but these are usually not things you need to or want to be archiving as part of your church's archive.

As part of that archive, you really only need to think about the records your church has deliberately created as part of its daily functions. And most of these other file categories listed here aren't really things that your church is likely to be actively creating regularly.

A significant part of the assessment of digital files is knowing what kind of file it is. This can most easily be identified by looking at the file's file extension. The file extension is a 3 or 4 letter suffix added to the end of every digital file.

Windows Explorer, unfortunately, tends to actually obfuscate this information a little bit. So the, really the best way to confirm what a file's extension is, is to look at the file's property.

And the image here shows, is a right click, hit the Properties button at the end to bring up that information. And if you, within Windows if you click that Properties button, you'll get some information much like imaged here.

Within Windows, the file extension can be seen within the Properties window inside the General tab and the Details tab. The type of file lists the file extension, and the Name field within the Details tab will show the full file name with the extension suffix. So you're always looking at that .pdf for example in this file. So that's how I know this is a PDF.

Sometimes the type of file is a little misleading because, like for example, this is listing it as a Firefox PDF document. That's just because Firefox is the default program to open that document. But even if it was opening with Adobe PDF viewer, it would always still just be .pdf. So that's why, that's why we look at the file extension rather than the type of file.

Next we're gonna go to some rapid fire for some of the most common file formats you can find, the four categories of files that I listed earlier.

For this slide in specific, these are the documents. These include word files, PowerPoint presentations, raw text files, and basically anything that is a PDF.

Image files include quite a few common types, but JPEG and PNG are probably going to be the ones you're most commonly see stored on your church's computer.

Moving images are less common than still images, but I expect many of you do have a digital file, a video stored somewhere or within... with someone at your church. These are probably the most common file formats for video, though MP4 and AVI are gonna be the most common out of all of these.

Audio is a bit more homogenous in file types these days. MP3 is probably the most common format that you'll run across. The WAV files are a probable second and M4A is increasingly common as a replacement for MP3.

So why do we care about knowing file extensions? Well, a big part of it is that we need to know if a file needs to be converted to something that is more preservation ready.

But before we can even talk about converting, we also need to define records as active versus inactive.

We talked a bit about this in our records management program, but to quickly recap, active records are those which are drafts, they're still being edited, or they're due to be changed in the near future, or they're just actively in use. Inactive records, meanwhile, are generally those which are finalized. They're not expecting any future edits. These may be documents that have long been replaced by a newer version, or they're meeting minutes that have been approved, or they're a policy document which is still a part of your active policies, but it is not, that document itself is not expected to change unless it's replaced by an entirely new version.

Inactive records are those which... are those are the ones that should be considered for conversion if they currently exist in a format that isn't really considered a preservation format. The reason we only really want to convert inactive files rather than active files, is because many preservation formats are not particularly editable, PDF being probably the biggest example in this case.

This slide lists preferred preservation formats across a number of file categories.

Level one are file formats that are considered the optimal preservation formats.

Level two are considered acceptable preservation formats for the medium term, but are considered to be problematic for long term preservation, either due to their reliance on third party support or other factors such as, inherently lossy file formats. JPEG is a great example of a lossy file format.

Level three are file formats which really should only be considered as preservation for short term.

And almost all of these less, file formats listed here rely on the continued support of the Adobes and Microsofts of the world.

Knowing what your files are and whether they need to be converted for preservation is really only half the battle.

Knowing where your files are and organizing them is just as, if not even more important. Unfortunately, it's hard to give super specific advice for this particular task, as I know every church stores their files differently.

However, ultimately, for almost everyone, the best place to start is really just a comprehensive look at all of your computers, or servers if you have them, and any cloud storage services that you use such as Dropbox or Google Drive.

A comprehensive review can take a few forms, but ultimately it's going to involve a lot of looking at files and full file folders, and determining both what and why files have been placed into those folders.

After a review, you want to enact a policy that sets an organizational schema for your files in your archive. This schema should be the same across systems and cloud services. So if you are archiving records on a hard drive, but you also want a backup on a cloud service, it should be 1 to 1 basically, your file organization schema across those two platforms.

The important part, though, is to create a schema. But if you're looking for a starting point, I would think about organizing files by department as sort of a clean starting point for how to think about further organizing your files.

Next thing to think about is the naming of your files. There's no one right way or best practice way to name files. However, having a consistent style for how you name files within your church's archive can be incredibly helpful, especially for future archivists or really anyone who in the future needs to be looking at your archived files.

Most importantly, file names should describe exactly what the file is. A very basic example: a file that includes meeting minutes should have the words meeting minutes in the file name itself.

File names must also all be unique. Computers automatically ensure this within the same folder, but generally all files across all of your systems should be unique. File names can include such info as departments, the status of a document, dates, and author names.

One specific suggestion I have for those who do collect digital photographs, if at all possible, name the people pictured in the photograph. Or if it's a group photograph, name the, what the group of people is, or what the event that led to that group being photographed is. Basically, any kind of identification of those photographs within the title itself will be super helpful for future people.

And here are some example file names I've come up with. Including, in the middle of this list, the name of the file that is using the script that I am currently reading from.

File names don't have to look like this. This is how I style files that I create. I find that using underscores to divide sections and lack of spaces between words helps to add clarity to your file names. I personally think this is a good way of doing it, but this isn't a requirement or any kind of standard.

Mostly importantly, though, is clear file names which describe the content of the file is what you're really aiming for with however you go about naming files within your archive.

Thank you again for being here for this church stewardship program. We hope you enjoyed and found something useful out of it.

And we're always available to reach out to. So I encourage you to send us an email to the info@14beacon.org email address listed here.

Now let's get Kyle and Billy back on the screen and open up the floor to questions, many of which I see have already come in.

KYLE: Great guys. Thanks so much for getting us started on this. Lots of great information here for dealing with tasks that are perhaps overwhelming at times.

You know, and I kind of think about coming in here or, you know, coming into your office when a collection has been dropped off, right? And the first set of work that goes through of just trying to figure out what are the, what are the various different pieces that you have here.

So I think one thing, you know, as the questions are coming in, Zack, you know, a nice element that you brought to this conversation is the real focus on digital files. And I wonder if you could just, you know, reflect a little bit more on the... you know, that decision about what's active and what's inactive.

And once you move something into the inactive category, do you have an obligation to continue to kind of update it over time and to check in on it? Or is it best to kind of think about that's kind of a locked box? Those records are there and you're just gonna kind of leave them there, indefinitely.

ZACHARY: Yep. Inactive documents, even if they are part of your active policy, really should be kind of considered locked documents, to only be edited really under very specific circumstances. They are documents which really should only be replaced with a new version that is a new whole version while that older version is archived.

So yeah, inactive you're really not looking back on it. You're not editing it anymore. You're not, even if you might actively be referring to it, there's no real situations where there's gonna be a new author who is adding to it.

KYLE: Is it helpful... and maybe you talked about this, to think a little bit about where you store those as well, once you've deemed them to be inactive?

ZACHARY: In an ideal situation, your active edited documents are gonna be stored probably in like, the church secretary's computer or sort of what is your centralized computer for your church where everything goes, essentially.

Copies of inactive documents can then be moved to the archives' hard drive, or cloud server, or some place that's a little bit separated from sort of your active documents. Especially that way you're not running into a situation where, you know, all of your financial and HR records are being kept on the same computer that you're also actively need to access to if you want to look at the meeting minutes from the church council meeting from ten years ago. So definitely try to have some division between the two.

You can still have copies. One great thing about files is that you can have multiple copies in multiple different locations. So you don't need to delete your meeting minutes from 2016 on your office computer when you move them to the archive. You can just have a copy of those files on the archive hard drive, or on the archives' Google Drive.

KYLE: Well, the questions are flowing in. A question that I knew was gonna come, and I'm so glad it was asked.

Walk us through one more time what the difference is between realia and artifacts or artwork.

BILLY: So, I knew when I put this in here, it was gonna be a question that comes up, like Kyle said.

The way that I tend to think about realia, and Zack, please add in, is this sort of idea of just like, objects and materials from everyday life that were created for a very specific purpose. And their purpose really is of the event itself.

So an example. Let's say your church is putting on a Christmas play, and you have a poster that you've, have in the church somewhere advertising it. We would kind of consider that to be a realia or an everyday object. So it's something that's very specific to one event or situation. Handouts, if you ever like, let's say you are having people visit for a tour or something and you create a handout specifically for them. The purpose is of it... the purpose of the item is very specific.

And we like to have this word separated out because sometimes people see these things as disposable. And we really like to kind of pull people back and not think of them as disposable.

I fully recognize it's kind of an archivists' term or a library science term. But as I said, I really wanted everyone here to kind of think about the categories, the way that we tend to think about them and sort of give you that extra bit of knowledge.

I hope that answered your question. I don't know, Zack, if you want to jump in and add anything else to it.

ZACHARY: Yeah, I can... mostly everything Billy said is very good.

I would mostly just add, realia is oftentimes non-unique, while artifacts oftentimes can be unique or near unique.

And realia is oftentimes also produced by third-party publishers, while artifacts can oftentimes be created by, or at least for specifically the purposes of, the functions of your specific church.

KYLE: Next question. So you mentioned in the Identifying records part, service programs. And by that, so the question is, do you mean worship bulletins?

BILLY: Yeah. They're more or less interchangeable. It's just the language that we go for.

The main... and if you're kind of wondering why we wouldn't collect them, it's more because usually in most cases, the service programs are really connected to the time and place of the church and the... there's a lot of unidentifiable information.

The one I always use as an example: a hymnal. They'll have the hymns that are being sung, but it never says what the hymnal is. So with so many different hymnals in existence, connecting that information back is very difficult.

The second is it is a lot. There is... it can end up just being bulks of information. Zack and I have both had almost full boxes that come to us that are just filled with these service programs, and we just feel in the grand scheme, their usefulness is a little, just not there.

I also noticed, since this question is asked by the same person, the reason I had put newsletters with a star as to why we don't collect newsletters. We collect them if they're complete runs, or relatively complete runs, if you have, like, five from various points in time, we just usually don't like taking them. But those are conversations that we have with you as a church when you decide to reach out to us. Those are conversations you would have at that time.

So just because I say we don't collect them, don't think that I'm telling you, you don't want to collect them. If that's what you want to do, by all means. But as an archive, we make certain decisions at certain points. But I felt it was appropriate for you to know about all the categories that are represented within your collections.

KYLE: And I think that's a really a good point to underscore. The Church Stewardship Initiative is here to empower all of you to organize the records in your church, and we are the first ones to say that the best archive is one that's still within the community that created it.

So, having those bulletins in the history room or, you know, in the administrative office so you can pull them down and check them out. Having those newsletters are great things.

A challenge for an archive like ours is that we can't collect everything. So we do have to make some choices within that.

So a great question... You were talking about financial records, and maybe we could drill down a little more. What kind of financial records do you mean? Approved budgets? Bank statements? Dividend statements? Where do we, you know, where do you kind of draw the line, or how do you suggest people organize their financial records?

ZACHARY: Financial records, Billy went over some of the major categories of the types of materials that we see and that we specifically collect. What we collect is not necessarily what a church itself would keep as part of its own collections, as Billy just very eloquently explained with the previous question.

But yes, financial records really covers anything that's related to the finances of the church. And it can cover everything from ledgers, to annual reports that report on financials, to the nitty gritty of receipts and bank statements.

I will say, a lot of financial records do not need to be kept for longer than seven years. And if you want more information on that, I do strongly suggest going back to our records management program, which goes into quite a bit of detail on the types of records and how long you actually need to keep them for various legal and tax reasons.

And a lot of those records after that period do not have what is, we would in the field consider archival value. And at that point, a records manager would say these can be disposed of in a reasonable and ethical way.

KYLE: A great question here from Susanne Veal, which I think is really following on, you know, trying to think about the... about what you're saying about digital records for paper-based records.

Susanne writes, great overview, thank you. I'm particularly grateful for the information on electronic files. Should we follow the same retention schedule as for paper records? So thinking about that active/inactive.

ZACHARY: Yep. Pretty much everything that we talked about in that program applies to digital records as it does to physical records.

KYLE: And in what you're talking about today and thinking about how you kind of think about where... when you decide what's an active record versus an inactive record, and how you sort of treat it within your collection.

ZACHARY: Yep.

KYLE: And so, I mean, Mary Hopkins has a question which I think we were kind of getting at earlier: Inactive documents need to be format converted forward, no?

I guess, you know, I mean, there are ways that there are certain limits, right, to the work that we can do here. I think about, you know, the papers that I wrote in college 20 or 30 years ago. I can't access them now because they're written on now deprecated forms of software.

As you all think about what you would want to receive as they come in, is it better to keep them in their sort of original, you know, do that one move forward and then keep them in that place, you know, keep them in that format. Or, you know, should you revisit it every 20 years, or...?

ZACHARY: I think there's a couple of different questions there.

When we receive digital records, we kind of receive them as is. So we would never ask to do... for someone to do a conversion forward as part of donating their records to us as part of a major donation, especially at the end of a church that has... is in the active process of closing, or merging, or such.

For within your own church's archive, I would suggest actively converting at the time of transfer to the archive of digital files.

A good way, if you have, if you already have your archives set up. If you've done a lot of work already in creating the organization for your archive: physical, possibly even digital. Something we kind of suggest, I think we've suggested in previous programs, is just have a time every quarter or every year, depending on what availability is, to just say, okay, we're gonna do a major transfer of files at this point in time to the archive.

What are the tasks that we need to do at that point? At that point, you know, convert all of your Word documents to PDFs. Transfer them over to the archive's hard drive or however you have it set up. And that's a really good way to actively approach this, while also not having to think about this literally every time you create a file. Oh, I also need to create a PDF so I can put it into this other Dropbox right at this exact moment. No, you can just do it at a set clip, however that clip is set. It could be, it could be monthly. I think that's probably too much. It could be yearly. That's probably a good sweet spot.

KYLE: So a follow up question on the realia versus artifacts. Just clarification. Is realia not for archiving, but artifacts are, or vice versa?

ZACHARY: Again, this sort of is a divide between what we collect and what your church archive may collect.

We have defined these as two categories of materials that are distinct from one another. We collect neither from churches that do donations to us. However, your church and your archive at your church may decide, and probably will decide that these are both things you want to keep.

Much of today is very much just about identifying what these categories are and how to move things... think of things within these categories without saying perhaps a value judgment on what you should do in terms of your collecting policy.

KYLE: Great question here from Shauna Williamson, who's kind of thinking about the proliferation of digital archive... public digital archives.

And Shauna asks, do you work with the New York City Public Digital Archive Collection for your records? I guess Digital Commonwealth might be another one we would ask for. You know, how do churches maybe think about those public collections? And if they have a, if there's a possible relationship with them?

BILLY: Yeah, that's a great question. I think the way I would want to answer it is sort of towards that community understanding that Kyle mentioned before.

We always encourage churches to reach out to places that are engaged in digitization and just offer their own material, or to engage in relationships. Relationship building is no different than how you do it within your own community with a historical society. Find the places that are doing this work.

I imagine, you know, the one that most people have probably heard of that's not related to the public library systems would be FamilySearch. They do probably more digitization of Congregational records than like anybody... specific kinds of records.

But there are people out there, you know, Digital Commonwealth, as Kyle pointed out, in Massachusetts, they're a big one. But I would... from what I know, like almost every state should have some sort of digitization program. How strong they are depends per state. I simply don't have the answer there.

But I yeah, I would absolutely encourage everyone, reach out to their, either their local public library, their city library, whatever situation you're in. And see what's there. And then of course, while doing that, also check out ours to see an excellent example of how that can work.

KYLE: Great answer for thinking about those kind of resources.

So here's another question I love. So Anna Sweringen, you know, a great supporter of the CLA, asks: Our church is only 50 years old. Do you collect items from a church that's not that old?

I think it's a great question about, is a young church worth archiving?

BILLY: Yes, I think they are. And I think we think they are as well.

You know, when it comes down to individual church collections that the CLA takes, we do take from open and closed churches. But we engage in those conversations individually and directly with us as a staff.

Again, the idea behind the Stewardship Initiative is to give you the ability to do some of the work that we do.

Anyone who's been here physically before knows our space cannot grow. We try our absolute best with offsite storage. But we are incapable of being the archives of all of Congregationalism.

So this project that we put together here was so that you can do this sort of work on your own, the community building.

But I personally, and I know Kyle and Zack agree, I don't... if a church is 5, 10, 50, 200, 300 years old, the community that exists within those does not... The age doesn't matter. I don't think any of us feel the age matters.

The 50 years of your community and your church is just as important to your group as the Old South Church downtown's 300 years. It's all about thinking about it from the perspective of your own community. So, yes.

KYLE: Great response.

You know, the three of us will go across the country, right? And, you know, we live in a region where a 400-year-old church... yeah, okay, we have 'em. But we go to other parts of the country where 100-year-old church is an old church. And I will say that we want to ensure that the entire 400-year history is preserved.

And so, a church that's come together in the last 25 years is gonna have some really important things to talk about, you know, and to show us about not just what the community was, but also how this tradition has evolved, and adapted, and changed.

And I know Zack is working right now with a church that I think is 20 or 25 years old. And one that, you know, is in the legacy process. But they're, you know, that's a 21st century, almost exclusively 21st century church. We need to know, you know, what did it look like then?

So, you know, I'm gonna underscore with a big, with a big line, you know, no church is too young to really be thinking about preserving its story.

So I think we're coming short on time, but I think there's a great question here from Mary Hopkins. What responsibility does an archivist have for keeping track of digital formats and making sure they're still accessible, especially for born-digital materials, which can become unreadable?

I think there's maybe two parts there if I could add to it. One part is, is it okay to only focus on the non-digital records? Can you still be an archivist and just do the paper stuff? Do you have a responsibility if you're doing this work to think about the digital as well?

And then Mary's question on top of that about making sure they're always going to be accessible.

ZACHARY: Short answer... kind of yes. [LAUGHTER]

There's a few layers deep there, which is also like... If you are an... if you are a digital archivist at a archive that actively collects digital materials, then yes, that is your responsibility to ensure that those files don't degrade, that they are still openable by programs, and that you have built the environments that will allow... those programs to be opened, even if the software has gone obsolete. That's where emulation in certain digital repositories comes into play.

If we are talking about the church archivist who may or may not have deep training in archives, or who may or may not be a full time employee of the church, that's where things get trickier.

In an ideal situation, yes.

Your church archive is hopefully in a situation where you are thinking about these digital files and trying to ensure that they are accessible on a hard drive. That they're not stuck on a flash drive or a CD that could die in the next few years. That you're converting the files to PDF or another file format that is more preservation ready for the long term.

But, as many times we've said in the course of this program, we understand that the ideal is far from reality. So oftentimes our advice really is do what you can. Even just thinking about it is already a lot of work towards, well, ensuring preservation.

So really, our advice almost always boils down to do what you can. If it isn't, you know, pitch perfect, what the archivists at MIT and Harvard are doing with their lots of money behind them, that's fine. We're also not capable of doing that ourselves. We work in an environment where resources are limited. And you are working in an environment that resources are even probably more limited.

So it's really is just a case of do the best you can with the resources that are available to you.

KYLE: What Zack's saying is applicable not just to the digital but also the paper files, right?

The fact that you're here, the fact that you're watching this program, you've already... you're already light years ahead of many others. So do the best you can.

Always reach out to us for advice. We're here, Monday through Friday, 9 to 5. Always reachable by email.

Thanks all for being here. Billy, Zack, thanks for another great program. And, take care.

ZACHARY: Thank you all for coming.