

# BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

## Membership

The Rt. Rev. J. Neil Alexander, *Chair*, 2015  
The Rev. Jennifer Baskerville-Burrows, *Vice Chair*, 2015  
Ms. Jeannette Huey, *Secretary*, 2015  
Mr. Mark J. Duffy, *Canonical Archivist, Ex Officio*  
Ms. Patricia Abrams, 2015  
Ms. Anne Bardol, 2015  
Ms. Kay E. Bishop, 2018  
The Rev. J. D. Godwin, 2015  
Mr. Lawrence R. Hitt II, 2018  
The Rt. Rev. Gary R. Lillibridge, 2018  
The Hon. Byron Rushing, 2018  
The Rev. Robert L. Sessum, 2018

### *Representation at General Convention*

Bishop Neil Alexander and Deputy Jennifer Baskerville-Burrows are authorized to receive non-substantive amendments to this report at General Convention.

## Summary of Work

**Mandate:** The Board of Archives directs the Church's archives and records program and the Canonical Archivist who is charged to manage and care for current and future historical records of the General Convention, the DFMS, and the wider Episcopal Church. The Board reviews, approves, and recommends policy to the Executive Council and establishes goals for the Archives that strengthen the mission priorities of the General Convention.

**Meetings:** In this triennium, the full Board met twice in person, and the executive committee met in conference six times. The Board gave close attention to its structural relationship to the General Convention and the DFMS, participated in the budget visioning process for the 2016-2018 triennium, further explored an archival facility in Austin for The Episcopal Church, and advocated for an electronic records repository and e-archiving system that could eventually benefit the wider Church.

### **Strengthening Governance Relationships**

The Board devoted a certain amount of its time to the question of how to best position the Archives to sustain its historical mission in the future, create a viable basis for fund-raising, and share a sense of ownership of the Archives by the whole Church. We considered for several years the goal of sustainability, which would translate into a reduced demand on the budget, especially in the necessary areas of physical plant and storage.

The big picture challenge for the Church is how best to elevate the Archives' profile as a giving opportunity and to shape its organizational identity as both a religious and national cultural asset that could leverage major gifts, foundation grants, and other restricted funds. The General Convention's authorization in resolution 2006-A143, reaffirmed in 2012-A162, to establish a second, foundation-type, 501(c)(3) DFMS subsidiary received the Board's careful consideration and unanimous support with the receipt of independent legal counsel's review. The proposal assured a governance relationship in which full control over property and general direction could be retained by the parent organization, the Domestic and Foreign Missionary Society (DFMS). The Society's management expressed its inability to support this development at this time, however, and counseled the Board on its limited authority to create a new or separate legal entity.

With General Convention's call to envision new structures for The Episcopal Church, the Board agreed to suspend further action to incorporate a 501(c)(3) subsidiary until the future organization of the Church and the Board's place in it are clearly understood. The Board took time to reconsider its own place within the structure of the General Convention and the DFMS.

We note one salient difference between the Archives and other separately incorporated agencies of The Episcopal Church. As the canonically authorized custodian of The Episcopal Church's official records, the Archives and its Board have a concrete legal connection to the DFMS and the General Convention. The Board recognizes its unique oversight responsibility to provide direction, accountability, and the highest possible standards of practice for the work of the Archives. With that assignment in mind, the Board regularly reviews the measures of impact and service, which are very high in quality, because they are the product of the committed but neutral management of the Church's records by professional archivists.

The Board periodically reports to Executive Council and is represented by the Archivist in his regular attendance at Council meetings, where he reports to the Standing Committee on Governance and Administration (GAM) and is available as a ready information resource. The Rev. Jennifer Baskerville-Burrows presented the most recent Board report to Council on February 6, 2014, which was well received and gave rise to Council's vote to press forward with a solution to the ongoing facility issue. The Board reaffirms the role of the Archivist and the staff as DFMS employees, who follow personnel guidelines in all matters and support the administrative and mission goals of the Executive Council and the Society.

The Board endorses the view that the historical integrity of the Church is wrapped up in the future of the Archives as a constant component within the flux of institutional change. The idea of subsidiarity is contained in its governance model in which the Board and the Archivist retain sufficient professional autonomy to conduct their mission faithfully but with full accountability. The Canons of the Church show that a great deal of thought has gone into the importance of the Archives and the structure that best supports the needs of the Church.

### **Toward a New Archival Repository**

With this report we mark 10 years since the Board, the staff, and four Executive Council committees have developed plans for the construction of an Archives repository for The Episcopal Church. We now find ourselves in early 2015 at a promising decision point on the downtown Austin site that was purchased by the DFMS in 2009 as a potential location for the Archives. Even as we continue to explore this prospect, however, the Board has concluded that this round of investigation must be the final one for this particular site.

The final report of the last Strategy Committee to the 2012 General Convention was the result of some extraordinarily good work led by the Chair, Dr. Joel Cunningham of the University of the South. The Committee produced several excellent recommendations, but the most critical piece — a budget request of \$730,000 for a targeted fund-raising effort — did not pass the budget committee of General Convention. A plan for even the most modest archives building is moot without a vehicle for local fund-raising. The ambivalence that followed that decision created a hiatus that gave the Board, Executive Council, and management time to mull over other possible alternatives.

In particular, Bishop Stacy Sauls as COO asked the Archives Board to accept some delay to allow the Council to consider the use of DFMS property in a more general way. In February 2014, Executive Council gave permission for the sale of the Austin property if that were preferable to maintaining the revenue-generating lot, which has produced income against principal, but also carries a debt liability that may prevent other prudent investments by the Society. At the same February meeting, the Executive Council's Advocacy and Networking for Mission, taking a keen interest in the Archives as an important source of history on mission,

social justice, and advocacy efforts, successfully urged Council to establish the ANo25 Committee to monitor progress on an Archives building.

Following these votes in early 2014, The Rev. Lang Lowrey and his firm, The Verta Group of Atlanta, were hired by the DFMS to look at the possibilities for developing the property or selling it outright. Mr. Lowrey met at length with the Board in November 2014 and gave an early, positive assessment of the prospects in Austin. He assigned an estimated appreciation of at least 20 percent in the value of the land since purchase, and described the increased desirability of the site adjacent to a major urban-redevelopment area, despite the known building limitation of a protected capitol view corridor.

As of this writing, the Board awaits the outcome of negotiations to proffer the land to a willing developer in exchange for an in-kind ownership transfer of an Archives building within the development. If these negotiations are unsuccessful, the alternative is an outright sale of the land and the possible commitment of the profit to a new and very different Archives plan. The DFMS Development Office has begun to anticipate fund-raising approaches to the new downtown Austin model. The result of these efforts should be known by the time General Convention meets in Salt Lake City.

**The Future Archives**

For almost as many years as the Board has contemplated a physical repository, it has made successive requests of General Convention to fund the development of an electronic records acquisition program. With the support of the Executive Council and management, that reality has come to fruition in this triennium with the allocation of seed money for 2014 and 2015 to purchase hardware and software that will help the archivists reach this priority goal. The investment in technology affirms that the paperless future will not be accompanied by a loss of the Church’s institutional history. The Board is confident that The Episcopal Church’s digital repository will eventually serve the wider Church as bodies look for a trusted source for securing vital and historical records that exist on their own information networks.

**FINANCIAL REPORT FOR THE 2013-2015 TRIENNium**

Archives/Records Management Expenses

	2013 <i>Actual</i>	2014 <i>Estimated</i>	2015 <i>Projected</i>	<i>Total Projected</i>
Salaries and Benefits (estimated)	\$ 627,784	\$ 704,844	\$ 754,044	\$ 2,086,672
Rent, Facilities, Storage	59,675	60,800	63,000	183,475
Information/IT Services	24,200	20,450	20,450	65,100
Digital Archives/Electronic Records	94,450	80,977	130,977	306,404
Operations	58,793	97,044	63,073	218,910
<b>Total</b>	<b><u>\$ 864,902</u></b>	<b><u>\$ 964,115</u></b>	<b><u>\$ 1,031,544</u></b>	<b><u>\$ 2,860,561</u></b>

Board of the Archives Expenses

	2013 <i>Actual</i>	2014 <i>Estimated</i>	2015 <i>Projected</i>	<i>Total Projected</i>
Board Meetings	\$ 244	\$ 23,583	\$ 0	\$ 23,827

**GOALS AND OBJECTIVES FOR THE 2010-2012 TRIENNium**

It was in the midst of the budget visioning process of Executive Council that the two primary concerns of the Archives Board and the curators — securing repositories for the collections and the digital repository — assumed more urgency and promise. In an extended evaluation of the visionary programs that came before the Joint Standing Committee on Governance and Administration for Mission, all of the Board’s goals were highly rated in the top quartile, and three of the four were among the top ten requests.

The Board recognizes its responsibility to oversee the work of the Canonical Archivist and to be as supportive as possible of the strategic goals that he develops with the advice of the Board and the collaborative curators and professional staff of the Archives. We have a special commitment to use the variety of our Church experiences to maintain the diversity and depth of the historical collections. The Board has actively encouraged the Archivist to introduce a historical voice into church-wide conversation through social media and web technology. The Board recognizes the Archives’ goals of simultaneously documenting threads of continuity and aspects of unexpected change as essential to the identity-building process in the Church’s spiritual, institutional, and cultural life. Board members assist the Director by recommending acquisition opportunities that will add fresh and meaningful expressions of mission and ministry to the historical collections.

The Budget appropriation requested by the Board to support these goals and the program of the Archives was developed with the Executive Council and the DFMS management.

**BUDGET APPROPRIATION REQUEST, 2016-2018**

Archives and Digital Records Management	
Salaries and Benefits	\$ 2,345,381
Rent	210,000
Operations	218,811
Information and IT Services	90,000
Digital Archives/Electronic Records	<u>375,000</u>
Total	3,239,192
 Board of the Archives	
Board Meetings	\$30,000

**REPORT OF THE ARCHIVIST**

The most influential book of American historiography published in 2014, *The History Manifesto*, makes a public argument about historical practice that has special appeal to Church archivists as we map our unique information ecology. It can offer insight for church planners and leaders as they design updates to timeworn structures and a tradition-laden identity that must compete with the market-driven, technologically intensive drama of American secular culture. Most institutional leaders are given few tools and little time to think in terms of the big temporal picture — seeing one’s community and place in the passage of an historical pallet.

Specialization in education and other disciplines has relegated history to the role of intellectual toolbox of opportune facts that support short-term systems tinkering and just-in-time solutions. When we think of the future, we see a canvas of our own making, clearly imprinted with borrowings from secular models. Our visions of the Church to be are projected on the basis of perceived megatrends and futurist hunches. Looking straight into the future, without indulging in the threat of crisis and uncertainty over one’s shoulder, requires a big-picture, patient, and longer view (the tradition of the *longue durée*). The authors admonish us that this big history is what explains communities to themselves and creates an interpretive frame for institutional meaning and individual sense making.

Significantly, the authors of this secular work identify just two institutions, universities and religious institutions, as the carriers of traditions and the guardians of deep knowledge in societies. For the Church, whether the topic is structure, race, or liturgy, looking at the past to service the future reduces the impact of unsupported myths and noise. Our story can be incredibly helpful to making our next steps less dramatic and careless.

History can create a common future out of the past. It happens in countless small ways now, and in the Archives, we marvel at the numerous examples of big-picture sense making in the steady stream of inquiries that ask: how did we get to this point, why did it come about this way, and what did those good people before us have in mind? In the 2012-2014 reporting period alone, the Archives prepared more than 63 in-depth research reports on numerous aspects of Episcopal Church governance, structure, polity, liturgy, administration, finance, membership, discipline, and social service — to name the most frequent categories of an active institutional Church life.

In 2012 the Archives completed 409 research packets for the General Convention, and in 2014 the staff prepared more than a dozen research reports for CCABs and DFMS staff related to preparations for the 2015 Convention session. It has been interesting to observe the integration of a historical perspective into conversations of the Executive Council, the CCABs, and some program administration. At times, the historical research helps to shape an argument for change and policy development; at other times, it slows a premature judgment. When this big history perspective is operationalized in the mission and work of our leadership, it demonstrates a qualitative measure of the Archives' value in the ordinary community life of the Church.

### **Research Services**

The Archives receives and answers more than a thousand reference and contact questions annually. A large subset of these inquiries requires our research assistance. The Archives staff answered more research inquiries in 2014 than in any other year since 2003. For the recent three-year period, research-assisted questions amounted in total to 874 (2012), 929 (2013), and 960 (2014).

Employment of a part-time staff assistant dedicated to research became necessary to respond to the greater inflow of requests. Use statistics indicate that the majority (58 percent) of the inquiries originate from Episcopal Church members (compared to more than 70 percent in the previous trienniums). The accelerated number of total users in the 2012-2014 reporting period owes to a more visible internet presence (and online contact form), which has simplified the process of asking questions, especially from individuals outside the Church's networks.

Although the Archives has been delayed in rolling out its new website, the existing site continues to draw steady traffic and is the way we are able to reach and measure a wider audience. The number of unique URL hosts (or individual users) served by the Archives' website increased incrementally in the reporting period: 81,740 (2012), 91,275 (2013), and 116,336 (2014). The Digital Archives and the African-American Episcopal microsite are the most popular resources on the Archives' website (<http://episcopalarchives.org>). On average, about 48 percent of the content is taken from the Digital Archives section of the site. About 25 percent of the website's total use is content that is viewed from the Archives' exhibit on African-American Episcopalians.

External use of the Archives by scholars is a steady if smaller percentage of the overall contact with researchers. In 2012-2014, scholars used the Archives to explore publications in a variety of areas. The following list is a sample of the topics covered by these studies.

- William White and early church structure
- Deaconesses serving the Pacific Northwest and California
- Missionary Mary Elizabeth Wood and the establishment of modern libraries in China
- Alexander Crummell and the Church in Liberia
- Episcopal Church marketing approaches to new members
- Japanese Americans and the internment camps
- Native American research on indigenous family historical ties in Alaska

Mexican Independent Episcopal Church and Church of Jesus Christ, and The Episcopal Church  
 Changes in Episcopal identity among Church leaders during the 1960s  
 Biographical research on The Rt. Rev. Walter Dennis  
 The Episcopal Church in Cuba  
 Nursing education at St. Luke's in Tokyo  
 Reactions to the Haiti Mission among African Americans  
 Mission policy in the Philippines in the 20th century  
 Influence of mission schools on economics education in Asia  
 Episcopal missionaries in the Appalachian Mountains

**Legal Research.** The Archives continues to expend considerable staff time and resources in support of legal counsel for The Episcopal Church and the dioceses that are the continuing Church jurisdictions. Litigation support has focused on the Episcopal Church in South Carolina and Fort Worth, with continuing casework in San Joaquin and other dioceses with parish property issues. The Archivist has been called to testify to the document authenticity for the trial courts. In response to a question from Executive Council for an accounting, the Archives calculated more than 1,136 hours of litigation support in 2013-2014, which has been valued at no less than \$220,000 at market labor rates.

**Institutional Research and Documentation Projects.** The Archives gave substantial documentation support in the triennium to the General Convention and to several standing commissions and committees. The curators created online digital repositories for circulating and collating historical data central to the interim bodies' assigned tasks. These collaborations included:

**Constitution and Canons, 2012.** The Archives staff completed editing the General Convention's revised Constitution and Canons for publication in 2013. This work requires a close reading and audit of the Convention minutes to authenticate each case of amendment. Staff spent 350 hours recovering accurate text, indexing, and preparing the work for publication.

**SCLM: Resources for Blessing Same-Sex Relationships.** The 2012 General Convention adopted the trial use liturgy, The Witnessing and Blessing of a Lifelong Covenant, which relied on a Digital Archive of historical resources on Same-Gender Blessings. The Archives continued to support the Commission by gathering more than 100 responses from Bishops on the trial use.

**Task Force on Marriage Resources.** The Archives collaborated with the Task Force to post a Digital Archive website of more than 1,250 pages of official statements, resolutions, and documents to help the Task Force place recent discussions of same-sex unions in the historical context of marital commitment.

**Rules of Order Study.** Research assistance was given to the Deputies' Special Study Committee on the Rules of Order in the form of a narrative report and table of cross-indexed abstracts of major changes to the Rules of Order since 1789. One hundred and twenty eight

(128) sets of rules for both Houses and Joint Rules were analyzed and posted to the Archives' website for the Committee's use.

**SCCC-White and Dykman Subcommittee.** The Archives has continued to work with the SCCC Committee to revise the Annotated Constitution and Canons (White & Dykman). The staff have provided both historical research and consulting on document management. A digitization effort has begun for the creation of an online case file archive. The Archives will work with the Committee to shape a web space and electronic library for future editorial work.

**Native American Boarding Schools Project.** The Archives has carried out a large-scale research project into the history of Indian boarding schools in the United States. The research to date has entailed a careful reading of the Records of the Board of Missions to understand the relationship between the Church and the U.S. government in establishing and running several Indian boarding schools beginning in the late 19th century. The curators have compiled a nearly full identification of the Episcopal boarding schools (most of them local). This work continues.

**Cancionero Archive.** The Cancionero Project involved an ecumenical team founded and led by Episcopal clergy to create a comprehensive Spanish-language hymnal. The Archives assisted the Project in creating a permanent digital archive of more than 1,600 files comprising 4.65 GB of data.

**General Convention Publications, Consulting, and Training.** The Archives has assisted the General Convention Office in recruiting and training a staff editor in the preparation of publications, beginning with the Blue Book, using modern XML publishing tools in a move away from word-processing publishing tools. For the Archives, this is an investment in clean, standard data and a robust preservation format for swifter conversion to the Digital Archives.

### **Digital Archives and Digital Access**

The archivists have made progress in converting legacy data to digital formats, which is now a standard approach to access and preservation programs. Conversion of records for permanent retention is a more intensive operation than simply producing scanned output. In the case of the frequently used *Acts of Convention*, for example, the task is a four-month-long assignment that requires a thorough validation of the General Convention's actions and minutes. Digitization for preservation and access involves careful document preparation, metadata assignment or indexing, scanning specifications, and post-production quality control. The quality review of the output is most critical and important to ensure authentic reproductions. Each page or data file is examined for content, clarity, and maximum visual representation, as

these digital documents are expected to replace the record copy. The following projects are among the most important accomplished in the 2012-2014 reporting period.

**Acts of Convention 2012.** General Convention resolutions were fully audited and normalized to add 282 resolutions with complete legislative history to the Acts database. Many resolutions required repair as the minutes from the Convention were in rough form due to an unexpected staff departure. Each piece of legislation was topically indexed. Metadata were added to clarify history and enhance searching.

**Reports to General Convention (Blue Book) 2012.** The Archives maintains a single source for researching the post-1976 reports of General Convention bodies, which were published in the Blue Book. The Archives was able in 2014 to update the Blue Book dataset with the 2012 General Convention reports, including additional metadata to improve search capacity.

**Digitization of Historical Collections.** Preservation of archival material through high-quality digitization is performed on a scale that selects material with high-use potential, and records that are currently kept on fragile media that are in danger of becoming technologically obsolete (e.g., videocassette recordings); or where loss of data is imminent due to poor storage and handling. Typically the Archives also creates low-grade (low-storage) digital copies for research purposes, many of which will eventually be offered through the Archives' website. The following list contains the major collections that have been transferred to digital preservation formats since our last report.

**Constitutions & Canons, 1964-1997; 47.4 GB.** Starting in 1964, the Constitution & Canons were published as separate volumes. This conversion completes a full run of these documents, which before 1964 were published as part of the Journals (previously digitized).

**Episcopalian/Episcopal Life, 1960-2011; 4 TB.** The Episcopal Church's official monthly journal was last printed in January 2011. The digitization project concluded in July 2013, resulting in 22,000 pages of digital data.

**China Oral Histories: Audio Interviews, 1981-1991; 391 GB.** The collection includes 53 interviews conducted over a 10-year period to document Episcopal missionaries in China in the first half of the 20th century.

**General Convention Audio and Video Recordings, 1970-1976, 1994, 2000, and 2006; 5.75 TB.** Responding to a request by the President of the House of Deputies for insights into leadership styles, the Archives converted analog audio recordings and video recordings of the 2006 Convention to preservation files with additional access copies.

**First Women Ordinands, 2001-2002; 4 GB.** As part of the 40th-anniversary commemoration of the Philadelphia 11, the Archives converted audio interviews from 2001-2002 with The Revs.

Alison Cheek and Nancy Wittig, as well as the recorded Philadelphia ordination service and post-service press conference from 1974.

**Interviews with The Rt. Rev. Harold Jones, c. 1978-1980; 8.42 GB.** Preservation and access copies have been made of analog audio interviews of Bishop Jones, who was The Episcopal Church's First Native-American Bishop.

**Sermons and Addresses of The Rev. Thomas W. Logan, Sr. 1975-2001; 18.3 GB.** Included as part of Logan's donated papers, a series of audio-recorded sermons and addresses from various parishes and seasons were converted from tape to digital preservation copy.

**Standing Commission on Health and Human Affairs: Hearings on Homosexuality, 1977-1979; 72.5 GB.** In the 1976-79 triennium, an in-depth study concerning ordination of homosexual persons absorbed almost the entire time and effort of the Standing Commission on Health and Human Affairs. The Archives converted a number of recorded hearings, testimony, and meetings held by the Commission in various cities throughout the United States.

**Episcopal Society for Cultural and Racial Unity, 1954-1955, 1963, and 1968; 16 GB.** Audio recordings converted in this collection include "The Saga of Selma," a 1963 ESCRU meeting; and other recorded readings and radio devotions by notable clerical figures in the organization.

**Missionary Papers, Dr. Floyd O'Hara, c. 1931-1939; 142 GB.** Five early 20th-century motion picture films, donated by Dr. O'Hara's son Brian, were digitally restored. The films document everyday life in China, including remarkable footage of the Nanking invasion of 1937.

**Selected Audio Collections, 1947-1999; 10 GB.** A number of smaller items were digitized to ensure preservation. These include: World Mission Records (1976-1987); Executive Council Meeting Audio Recordings (1991-1998); Interview with the Reverend Bonnell Spencer (1990); the Swatos/Phillips Research Interviews with Episcopal Church Leaders (1998-1999); Interview with Cathedral Films' James Friedrich (1947); and Presiding Bishop John Allin's "Statement on the Ordination of the Eleven Female Deacons in Philadelphia" (1974).

**Digital Content and the Archives' Website.** Since 2012, the staff has devoted considerable resources to developing a next-generation website presence by means of a content management system for the site. The premature loss of the digital curator at the height of that development and a prolonged recruitment impaired our progress. A new digital archivist was hired in the summer of 2014, and some recovery of our

schedule allows for an optimistic expectation that the new site will debut before General Convention 2015. The site has been designed with the help of programmers, but is based on the archivists' specifications for user preferences. The greatest challenge is the migration of legacy data to the new site, which requires intensive staff focus and participation. The site is designed to host a larger data offering (through an Episcopal Text Center), while maintaining good navigability.

### **Electronic Records Acquisition/Digital Repository**

A time will come in the near future, optimistically the next Convention report, when highlighting work on electronic records *per se* will appear strangely outdated in view of the rapid transition of so many archival operations to the routine management of digital data. In recent years, the entire curatorial staff have engaged in various threads of research on the constantly changing (and improving) methods and workflows for acquiring electronic records. The curators have identified best-practice approaches for securing large datasets into a digital repository to ensure the survival of contemporary history and business records. The Archives acquired framework components of a storage system to make this happen in 2013, but fell short of what was needed for software to acquire and manage the records.

Two events gave momentum to a positive change in our direction in 2014: the hiring of a new digital archivist to fill out a holdings management team, and a refreshing vote of confidence from the Executive Council in the form of a supplementary budget allocation for this assignment. The budget allocation came on the heels of an Archives proposal requested by Council's Committee on Governance and Administration.

The Committee had looked with concern on possible risks related to copyright, data privacy, and information security in online systems of the DFMS and General Convention — information governance issues that the Archivist has frequently underscored in advocating for an electronic records management system for the DFMS. With the additional funding, the curators began planning in earnest in late 2014 for the first phase of an e-records acquisition system: in-house servers and backup options, software for ingesting and authenticating e-data, and a workbench of open-source tools for normalizing, tracking, refreshing, and indexing electronic records. The digital repository will begin operation in 2015.

An early application will be the creation of a repository interface to accept digital filings from dioceses and others, especially the canonical deposit of journals and annual reports. The digital repository will be tested in early 2015 as the Archives transfers up to 13 TB of stored legacy data (or 26 TB for redundant storage) to the vault-like servers that support the repository. Secured backup will be part of the overall architecture by negotiating a private cloud contract.

To ensure sustainable preservation of the electronic records, the curators regularly audit and document IT systems, and utilize outside consultants to upgrade and test current technology and network stability. In the past triennium, we have installed two new high-end data servers and new on- and off-site back-up provisions. A less expensive internet service provider was selected with the installation of a new fiber-optic cable connection. The information specialization of professional staff allows the Archives to conduct its own IT troubleshooting, which minimizes our annual system administration costs to less than \$20,000 per year to maintain multiple servers, 10 workstations, and an open-source software platform.

### **Holdings Management and Access**

As of the end of 2014, the Archives' holdings are stored in five separate locations, including three off-site warehouse locations, the Austin repository, and our New York Records Center. None of the storage facilities for the Church's archives are adequately climate-controlled, but we are forced to use them for cost-control reasons.

Approximately 70 percent of the archival material is housed in the Austin and New York facilities, which are kept at approximately 70° F, which is 15° F above generally accepted archival standards for a preservation environment. The HVAC system for the Austin facility was replaced in 2013, which has meant that fluctuations are controlled and minimal; humidity levels are moderate at about 55-60 percent. The storage conditions for the Church's archives are clearly inadequate and below industry standards. This situation is at best a holding pattern until a decision is made on a permanent archives facility. The total holdings measure approximately 18,000 cubic feet of analog or physical data, and 12.5 TB of digital data.

Reduced staff resources and the heavy research commitment to litigation support in the triennium pushed many back-of-the-shop archival tasks into arrearage — specifically intake, processing, and descriptive cataloguing. Thanks to some donor grants and an amazing crew of part-time employees (many associated with the University of Texas Information School), we made some notable progress.

**Archives' Online Catalogue.** The goal to launch our online catalogue in 2014 (tentatively dubbed, "Epilog") has been delayed. We pursue this goal as a priority, and some small but important steps were accomplished. In 2013, the curators completed a new intellectual classification scheme and devised a workflow that breaks from the legacy finding-aid systems, freeing the curators to think of the catalogue as a whole new way to map the archives for users. The long, hard work of converting a hodgepodge of old descriptive data will begin in 2015.

**Audit of Holdings.** The Archives completed a comprehensive audit of its holdings in 2014. This two-year project was the first in a decade. The audit is a periodic measure that ensures the holdings' inventories are fully compliant with the material they are intended to describe and that they contain all the essential information needed to locate and respond to inquiries about their general content and provenance. It was a two-way audit from inventories to holdings, and from the shelves back to the various guides and control lists. Side benefits included the collection of new data on preservation status, identification of collections without content listings, re-housing of poorly stored material, and spreadsheets that will allow us in the future to efficiently amalgamate multiple legacy holdings lists. The data showed 97 percent accuracy score for the Archives' inventory systems; only 3 percent of the collections audited showed problems. The standardization possible as a result of this big effort was a major step forward for the Archives.

**Archival Processing.** Arrangement and description of archival records can occur at various levels of detail depending on the research value of the papers, the amount of funding available, and the obligation to donors who have entrusted family papers with the Archives in the expectation of future access and care. In the course of the 2012-2014 period, the curatorial staff created archival inventories or finding aids to 291.2 cubic feet of records. The following collections received significant treatment at various degrees of descriptive depth. All are now open to researchers.

**Personal Papers of The Most Rev. John Maury Allin, 1887-2003; 40 cu. ft.** A full finding aid was completed in December 2014. The two-year project was partially funded by a grant from the John Maury Allin Foundation. The 23rd Presiding Bishop's personal papers complement official records, forming the most complete historical record among the primates.

**Records of the Bishops in Council, 1871-1939; .3 cu. ft.** Before the routine of interim meetings, Bishops conducted official House business as a counsel to the Presiding Bishop. This collection

was re-discovered among the Archives' miscellaneous papers and includes material on the service of missionary bishops, disciplinary matters, and material support of the clergy. The House Rule on Bishops in Council was repealed in 1989.

**Papers of The Rev. William Baillie Green, 1952-2011; 31 cu. ft.** Donated by Mrs. Donna Green, the Green archive is a rich collection including sermons, research papers, correspondence files, and audio recordings that document Green's ministry, theology, and ecumenical leadership.

**Records of the Ladies Cuban Guild of Philadelphia, American Church Missionary Society, (1855) 1885-1916; .6 cu. ft.** Records kept in scrapbooks document the earliest American missionary efforts in Cuba. The legacy papers were processed from the Archives' miscellaneous uncatalogued archive left by the Church Historical Society.

**Personal Papers of Mary Lamberton, c. 1954; .3 cu. ft.** The collection is composed of Ms. Lamberton's four-volume typescript history of St. John's University, Shanghai. The papers were processed from the Archives' miscellaneous archive left by the Church Historical Society.

**Personal Papers of William Ives Rutter, Jr., 1871-1952; .6 cu. ft.** Rutter was a founding lay member of the Church Historical Society and was active in a variety of Church and secular organizations, particularly in Pennsylvania.

**Records of the Society of St. Margaret, 1855-2010; 54.5 cu. ft.** The historical records of these women religious represent activities documented in the archives of the mother house in Boston. It covers governance and daily work routines, the work of St. Monica's Home, the Haiti mission in post-WWII years, and several mission houses and activities in other cities of the United States and Canada.

**Papers of The Rt. Rev. John Shelby Spong, 1955-2008; 9.5 cu. ft.** Correspondence, early publication drafts, and a notable set of scrapbooks comprise this addition to Bishop Spong's personal papers, which cover his appearance on numerous panels and lectures.

**Papers of The Rev. Dr. J. Robert Wright, 1950-2011; 35 cu. ft.** Dr. Wright's life, ministry, and scholarly contributions are documented in a complete archive of articles, correspondence,

subject files, and personal collections. Wright has been a prolific author and leading ecumenical figure who also served as Historiographer from 2000 to 2012.

**Diocesan and Parish History Collection, c. 1837-2014; 84 cu. ft.** This accumulating set of local church histories is frequently used for biography, architecture, church history, and even some legal inquiries. This once-loose collection has been completely inventoried for improved access. The Archives relies on donations from parishes to maintain this collection.

**China Mission Records Finding Aid, 1836-1954; 48 cu. ft.** The curators created a new archival finding aid to the heavily used China Mission Records (more than 100 document boxes). They conducted a full quality-control audit and prepared a cross-walk index to the old finding aid. The collection is now well-housed and documented, and is stored in nearly half the former space.

**Canonical Archival Collections, 2012-2014; 12.25 cu. ft.** These records include the Registrar's Consecration and Ordination Files and the Archives' official collection of Diocesan Journals of Convention. Despite repeated requests, only 59 dioceses submitted journals in 2013; 38 in 2014. In theory, the Archives should receive about a hundred journals in any one year.

### Acquisition of Records and Archives

In the midst of hard choices about where to devote our energies with staff vacancies and radical space limitations, the Archives has attempted to maintain a judicious acquisition effort. We acknowledge less active donor cultivation in light of the limitations. Keeping on top of the intake of new material has been a challenge, and as of this report our accessioning backlog is a full three years in arrears. We have received support from both the President of the House of Deputies and the COO to recapture in 2015 some of the labor time spent on litigation support to address our accessioning backlog.

The Archives acquired approximately 316 cubic feet of paper records in the Austin repository in the three-year reporting period 2012-2014; and approximately 10.3 TB of electronic records, which represent about 80 percent of our total digital holdings. The following is a list of outstanding acquisitions (with dates when available) in Austin or New York for the reporting period.

#### Private Papers

- Episcopal Oral History Collection: Niobrara Oral History Project
- Papers of The Rev. Dr. Mr. Lee Belford/Diocese of Mississippi
- Papers of The Rev. Robert Brooks
- Papers of The Rev. James Callaway
- Papers of The Rt. Rev. Arthur C. Coxe
- Papers of The Rt. Rev. Paul Jones
- Papers of Ms. Elizabeth Boyd Graham
- Papers of Ms. Katherine Grammer

Papers of The Rev. Peter Gray Sears  
 Papers of The Rt. Rev. John Spong  
 Papers of The Rev. Leonel L. Mitchell  
 Papers of The Rev. (Chaplain) Kermit Smith  
 Papers of The Rev. Samuel Farmar Jarvis  
 Papers of The Rev. Winston W. Ching  
 Papers of The Rt. Rev. Bland Mitchell  
 Papers of The Rt. Rev. James M. Richardson  
 Papers of The Rev. George Maxwell Randall  
 Papers of The Rev. Max Salvador  
 Papers of The Rev. John W. Wood  
 Papers of The Rev. John D. Worrell

**General Convention and the DFMS**

Records of the Communications Office (1982-2007)  
 Records of the Church Deployment Board (1968-2009)  
 Papers of the Deputy Bishop for Anglican Communion Relations (2008-2011)  
 Records of the General Convention Executive Officer (1994-2012)  
 Records of Federal Ministries (1997-2010)  
 Records of the General Convention Legislative Session (2006-2009)  
 Records of the General Convention Legislative Committees (2012)  
 Records of the Government Relations Office (1992-2008)  
 Records of the Global Peace and Justice Office (2008-2010)  
 Records of the House of Bishops Committee on Religious Communities (c. 1983-2013)  
 Records of the Joint Standing Committee on Program, Budget and Finance Files (2004-2009)  
 Records of the President of the House of Deputies Bonnie Anderson (c. 2007-2012)  
 Records of the Presiding Bishop's Office (2006-2010)  
 Records of the Program Officer for Latin America (1989-2009)  
 Records of the Registrar of General Convention: Ordinations and Consecrations (2011-2013)  
 Records of the Standing Commission on Liturgy and Music: Blessings Project (2009-2012)  
 Records of the Trust Fund Committee and Investment Committee File (1985-2008)  
 Records of the Asiamerica Ministries (1970-1995)  
 Records of the Controller (2005-2013)  
 Records of the Presiding Bishop's Canon to the Ordinary (1998-2013)  
 Records of the United Thank Offering (2000-2011)  
 Records of the Youth Ministries Office (2006-2013)

**Episcopal Church-Affiliated Agencies**

Records of the Anglican Religious Orders in the Americas  
 Records of the Association of Anglican Musicians  
 Records of the Association of Episcopal Deacons  
 Records of Bishops Executive Secretaries Together (BEST)  
 Records of the Brotherhood of St. Andrew  
 Records of the Chancellor's Network and Conferences  
 Records of the Church Periodical Club  
 Records of the Community of the Way of the Cross  
 Records of the Episcopal Diocesan Ecumenical and Interfaith Offices  
 Records of the Episcopal Partnership for Global Mission  
 Records of Episcopal Renewal Ministries  
 Records of the Episcopal Society for Racial and Cultural Unity (accretion)

Records of the Historical Society of the Episcopal Church  
Records of the Mississippi Conference on Church Music and Liturgy  
Records of the National Altar Guild

### **DFMS Records Administration**

The New York office of the Archives coordinates the management of semi-active records of the DFMS and General Convention and assists offices with the organization of information and retention requirements. In broad statistical counts, the Office accessioned 742 cubic feet of paper records in the 2012-2014 period, a large part of which was a purge of filing systems that had become inactive with staff reductions and structural reorganization. The Church Center archivist has conducted more than 516 consultations with offices and staff in the same period to assist them in managing electronic and paper records. The New York Archives Office received 52.38 GB of electronic data, 95 percent of which was received in 2014, when the Archives began developing an electronic records acquisition platform.

The Archives was especially instrumental in creating the first online “employee resource and information center” (ERIC), which brings to the employee’s desktop current forms, policies, directories, and other quick reference data. Built in the SharePoint software, ERIC has proven very popular with New York and remotely located DFMS staff, especially as a central human resources supplement. The Records Manager serves a gatekeeping role in maintaining accuracy and currency of the data. The ERIC platform was one of several data-mapping exercises that the Archives staff led for the Mission offices, the Presiding Bishop’s office, the Finance office, the General Convention Office, and several smaller DFMS units. The organization of electronic directories incrementally reduces staff inefficiencies with workstation data management. As of 2012, the Records Manager regularly participates in new employee orientation and termination procedures to ensure compliance with record keeping and retention policy.

**Enterprise Retention Schedules.** The Archives finished a four-year project in 2014 to develop new records retention schedules for the DFMS and the General Convention. The rewrite of departmental schedules was occasioned by several reorganizations at the Church Center beginning in 2006 that created new administrative and program functions, and closed many old record-creating units. The completely revised retention schedules contain more than 355 defined record types, which are cited to legal and administrative retention requirements. The Archives expects to submit the schedules for Executive Council approval in 2015. Once adopted, they will be posted to the in-house (ERIC) intranet and made available on the Archives’ website as a template for church-wide use.

The Enterprise Retention Schedules are the final piece of management policy development that began in the last triennium with Executive Council’s approval of a DFMS Records Retention policy. It is a tool that we hope will help the employees and agents of the DFMS to understand the need to keep records that demonstrate accountability, protect the Society from legal risk, and assure the Church of a historical record of administrative and program activities.

The curators are particularly concerned to implement retention policies for electronic data, especially private DFMS records kept in online vendor systems and other internet cloud storage, data held on inactive data servers and “shared” drives, and data held on laptop drives and home computers by remotely stationed employees. Many DFMS staff have turned to the robust, unfettered, and free tools of third-party service providers — from Gmail, Amazon, and Dropbox to the popular social media communities. These communication vehicles must also be documented in order to retain important corporate information and eliminate records that contain private or personal information. Needless to say, our paramount concern is to acquire the historical data in these externally stored records.

## Outreach

The Archives provided more than 478 individual consultations to parishes, dioceses, and Episcopal Church organizations in the 2012-2014 period. These consults covered a variety of records and archives issues, but increasingly centered on matters of the retention and preservation of electronic records and digitization. Several guides were created and posted on the Archives' website covering these topics, including two revisions to the *Records Management for Congregations: An Archives Manual for Episcopal Parishes and Missions*, which is a comprehensive tool on these topics and others. Other outreach efforts to the wider Church are described below.

**Niobrara Convocation, 2012.** The Archives staff were honored to participate in the annual Niobrara Convocation at the Standing Rock Reservation, where we conducted several oral history interviews with seven leaders from various Native-American tribes who have been long-time church members, both lay and clerical, in the indigenous Episcopal community.

**Social Media History Campaigns.** The use of Facebook to elevate the Archives' visibility took a leap in 2013 with an online summer campaign to honor the work of Episcopal Saints Thurgood Marshall, Pauli Murray, and Jonathan Daniels. Conceived as a joint project with President of the House of Deputies Gay Jennings, 33 postings of visuals and text focused on both positive and negative aspects of the Church's role in the Civil Rights Movement, with special emphasis on the impact of the Voting Rights Bill. The campaign increased our Facebook "likes" by 85 percent. Our most popular post, which covered the March on Washington, was viewed by more than 8,000 people and shared 121 times. The Archives carried through a 20-entry series of Facebook postings marking the 40th anniversary of the Philadelphia 11 ordinations. The campaign was viewed by more than 11,000 people, and one posting alone was shared 94 times.

**Grant Application for Navajoland.** The Archivist prepared a grant request from the Episcopal Church in Navajoland to the NCI Fund of the Boston Foundation. The grant, which was awarded in September in the amount of \$12,500, will fund an outreach program on alcohol awareness. The Archives' custody of the Records of the North Conway Institute on alcohol addiction inspired this effort.

**Episcopal Archivists Advisory Group.** A group of professional diocesan archivists meet regularly to participate in collaborative projects relating to local church archives. The Archives provided leadership in this role by completing the development of a website in 2013 that brings resources and standards together for parishes and other dioceses (<http://episcopalarchivists.org/>).

## Acknowledgments

The Archives received with thanks notable donations of money in this triennium. The John Maury Allin Foundation made a grant of \$20,900 for the processing and website exhibit of the Presiding Bishop's archives. The Rev. John Kitagawa, a former member of the Board, donated \$5,338.59 to the Archives in memory of his mother, Fujiko Sugimoto Kitagawa, who died earlier in the year. The Archives is the repository for the papers of John's father, The Rev. Daisuke Kitagawa.

A second gift of \$1,000 was received from the Historical Society of the Episcopal Church. Dr. Joel and Mrs. Trudy Cunningham have donated \$1,500 to the Archives in this reporting period. Alice Whitaker donated \$200 as a thank you for research that would not have been charged as a family member of donor Marilyn Robertson, widow of The Rev. E. Bolling Robertson. Mr. John Marsh made a \$250 donation for the purchase of historical publications. We very much appreciate these and countless small gifts to supplement our preservation and outreach funds.

The Episcopal Church has no finer set of dedicated employees who work cheerfully, with great resourcefulness and expert judgment, even under the difficult physical constraints that a sub-par facility imposes on their daily work habits. The current Archives staff is a team of truly fine and committed professionals, with whom I am honored to work. They exhibit a laudable faith that the Archives and its information services can make a difference to the Church's mission and ministries. Recognition is owed those responsible for the work described in this report: Corrinne Collett (Records Management and Information Services Archivist), Sarah Dana (Research Archivist), David Hales (Administrative Deputy), Whitney Hughes (Digital Archivist), and Lauren Kata (Archivist for Digital Access and Holdings Management). The curators truly value our part-time archivists and area specialists who bring a no-nonsense approach to resolving the piles of work laid before them. Special thanks to Molly Brunson, Keely Drummond, Amy FitzGerald, Patrick Goetz, Jonathan Hierholzer, Eleanor Miller, Michael Nugent, Amanda Pyszka, and Drew Schmitz.

We are grateful for the gift of wise and helpful leadership. We acknowledge the stewardship that individual members of the Board of Archives and its Executive Committee exercise in their care of the Archives, and likewise for the active support of the President of the House of Deputies Gay Jennings, Chief Operating Officer Bishop Stacy Sauls, and General Convention Executive Officer Michael Barlowe. In their own way, each person has made a contribution to the intellectual space that the curators require to stay focused on God's historical project for The Episcopal Church.

*Mark J. Duffy*  
*Canonical Archivist and Director of Archives*  
*December 30, 2014*