

**The Archives of the Episcopal Church
2014 Curatorial and Administrative Operations
Director's Report
Board of Archives, March–September 25, 2014**

Research, Reference and Consultations

***Litigation Support.** The staff continues to give priority research service to litigation support on behalf of the continuing dioceses and parishes. Since our last report, time and attention has focused on the Episcopal Church in South Carolina. New court activity in Fort Worth and continuing case work in San Joaquin has also generated heavy use. For the South Carolina case, the Archivist was called on to testify to the authenticity of documents copied from the Archives for the trial court. It was a three-day trip that included time with the attorneys and four hours of testimony. In recent months, the chancellor and legal team for the Diocese of Fort Worth have contacted the Archives with urgent requests for digital copies of diocesan journals (to replace copies inadvertently destroyed) and other evidential documents that show the historical connection to the Episcopal Church.

***Internal Institutional Research.**

Major research was conducted and reports prepared for General Convention bodies and DFMS staff on the following topics. It is not an exhaustive list but covers substantial new research only.

- Church property and jurisdictional history of Guam and the Church in Micronesia
- The first phase of research into The Episcopal Church's Native American boarding schools, most of which were not operated by the DFMS but by local Church entities
- Boards and affiliated agencies of The Episcopal Church
- Several inquiries on the history and evolution of the Budget of The Episcopal Church
- Copyright research for the use of protected content on the TEC website
- Extensive support for Episcopal Relief and Development in preparing narratives and visuals for the their 75th Anniversary celebration
- Public policy inquiry on freemasonry and The Episcopal Church
- History and commitment details of agreements/covenants covering official dialogues and consultations with ecumenical partners; creation of a digital archives website
- Title IV disciplinary inquiries
- Constitutional amendments related to Prayer Book revision and trial use
- History of deaconess orders for liturgical observance
- Nomination, installation and consent practices in Presiding Bishop elections
- Several search requests for the Chaplaincy Office
- Historical process and examples of the division of dioceses
- Form and content of episcopal consecration certificates
- History of the office and election of the Historiographer
- History of the office and election of the Custodian of the Prayer Book
- History of Episcopal Migration Ministries
- SCCC: White & Dykman Subcommittee case history research
- Analysis of the meeting practices (agenda, schedule, practices, etc.) of Executive Council
- Past treatment of unfunded resolutions
- Province IX and IARCA relationship
- UTO financial support of DFMS missionaries

Use of “Memorials” to address or petition General Convention
History of the Episcopal Church in Navajoland
Official relationship between The Episcopal Church and the Church of South India
Autonomy process for the Episcopal Church in the Philippines

Church-wide and External Research Inquiries Received.

The following is a partial list external research highlighting major commitments to on-site research in the Reading Room:

- Seminarian research for publication on William White and early Church structure
- Research on deaconesses serving the Pacific Northwest and separately in California
- Several researchers and interviews from China as part of a documentary film on Missionary Mary Elizabeth Wood and the establishment of modern libraries in China
- History of the Provincial system
- Incorporation of the Church in Liberia
- Episcopal Church marketing approaches to new members (ads, welcoming messages, etc.)
- Doctoral research on Japanese Americans and the internment camps
- Native American research on indigenous family historical ties in Fort Yukon, Alaska
- Academic research on an Episcopal priest that apparently contributed significantly to the scientific community's knowledge of the life cycles of several rust pathogens
- Extended academic research on the Mexican Independent Episcopal Church and Church of Jesus Christ and their relationship to The Episcopal Church
- Book publication research on the influence of social and cultural issues on the larger mission and local ministry of The Episcopal Church

Consultations

The Archives responded to individual administrators, archivists, and volunteers on a variety of records retention, digitization, and electronic information management topics for the dioceses of Arkansas, Central Pennsylvania, Connecticut, Idaho, Los Angeles, Louisiana, Massachusetts, New Jersey, Vermont, Western Michigan; and Province I. Customized solutions were also offered to several Episcopal Church organizations, including Episcopal Church Building Fund, the Association of Episcopal Deacons, and the Consortium of Endowed Episcopal Parishes.

*The Director served on the Search Committee for the SSW Library Director, and participated in the evaluation process for the Booher Library with representatives of the Accreditation Committee of the Association of Theological Schools.

The Archives provided guidelines to the Bishops Executive Secretaries Together (BEST) group in response to a request for assistance on selection and use of e-document management systems.

Staff completed an evaluation of a proposal to the Presiding Bishop from History Matters; and was asked to review and comment on the National Archives/NHPRC strategic plan.

The Archives provided oral history project guidelines to the office of Latino/Hispanic Ministries for an interview project with Episcopal leaders of the Hispanic and Latino/a community. The ministry officer in this area will conduct the interviews some time during the Fall for eventual deposit with the Archives. These guidelines may be applied to other collaborative oral history initiatives in the future.

General Convention Support

***Journal of Convention 2012.** The Secretary of Convention reached out to the Archives for assistance to recover the 2012 Journal of Convention after the sudden departure of the incumbent staff responsible for editorial preparation. Over 130 hours were invested by several Archives' staff members to recover the text and create an index for the volume. All work was completed, although our progress was compromised by the use of nonstandard software in the original version.

***Blue Book 2015 Consulting and Training.** The Archives is assisting the General Convention in training a new contracted staff editor in the preparation of the Blue Book using modern XML publishing tools in a move away from Microsoft Office/Adobe publishing tools. The advantage for the Archives is a clean, archival preservation output and the swifter creation of the much used Digital Archives. The Archives participated in preparing job descriptions and interviewing candidates for the editor and a related position in online content management.

Legislative Process Consulting. The Archives staff have been consulted by the GCO and its contractors on matters relating to the interpretation of the Rules of Order and historical legislative actions of General Convention, ostensibly to prepare the specifications for the new legislative processing software system.

Diocesan Journals Acquisition Coordination. The Archives began working more closely with the Secretariat to devise a protocol for acquiring a comprehensive collection of Diocesan Journals of Convention. The goal is to eliminate duplicating efforts in contacting dioceses regarding their annual canonical deposit by distributing common deposit guidelines, and streamlining a regular outreach to dioceses "in arrears." This work continues.

Other Contributions.

- Staff drafted and shared an extensive discussion/reaction piece for the GCO on the progress of legislation and the possible design fixes to the computer systems, on-site documentation procedures, and general standards.
- We continue to map workflow implications regarding research support and other record keeping functions in anticipation of web-based technology changes and the paperless 2015 General Convention.
- Assisted GCO staff to prepare a revised version of the 2015 GC schedule-at-a-glance
- Assisted the Registrar with a consecration in the Diocese of New York.

Church-Wide Outreach

***Facebook Campaign.** The Archives carried through a series of related Facebook postings marking the 40th anniversary of the Philadelphia 11 ordinations. Staff created and posted 20 entries with images. The site was viewed by over 11,000 people and one posting alone was shared 94 times. The campaign moved us by 100 to well beyond the 1000-likes level. We followed up the series by contacting six of the women to acquire their papers and heard back from two who have committed (Nancy Wittig and Alla Bozarth).

The Archivist assisted in drafting and sponsoring a grant request from the Episcopal Church in Navajoland to the Boston Foundation. The grant, which was awarded in September in the amount of \$12,500, will fund a program for an alcohol awareness effort.

The Archivist attended the annual meeting of the Society of American Archivists where he was named a Fellow of the Society of American Archivists for his outstanding contributions to the archival profession. This is the top honor that the profession bestows on its members.

The Archivist and the Collections Manager were both interviewed on camera for a documentary film honoring Episcopal missionary to China, Mary Elizabeth Wood. Wood is known in China as the "Queen of Modern Libraries," for her work at Boone College and her founding of Boone Library School in Wuchang in the 1920s. Archives staff will also participate in a special keynote session about Wood in October at the Library Association of China meeting in Beijing, where portions of the film will be debuted.

Archival Holdings Management

Archival Processing. In order to accommodate an expansion of our IT equipment center, we have found it prudent to tackle several legacy collections with complex appraisal challenges. A large set of **Miscellaneous Historical Documents** created during the years of Historical Society management has surfaced some gems, the earliest being a broadside from 1785 announcing the gathering of clergy in Pennsylvania to promote a new Church government. We have rediscovered a valuable set of papers from 1896–1936 of the "Bishops in Council," which appears to have been the forerunner of the interim meetings of the House of Bishops. The collection includes reports and correspondence on marriage, discipline and authority, ordination, and engagement with Lambeth. Processing of the collection continues as time allows.

***John Maury Allin Processing and Web Exhibit Project.** The processing of the Allin Papers continues with the help of several student interns and part-time archivists. Among the accomplishments in the past several months has been the sorting and processing of over 3,500 pieces of JMA's letters into a coherent sequence, and identification of a large photographic and audio-visual tape collection (5 cu.ft.). The processing phase of the project is slated for a year-end completion. The second phase of this project is the preparation of materials for an online exhibit of the Presiding Bishops' ministry. To that end, we have made contact with parishes and dioceses to identify and digitize important archival material related to Bishop Allin not held in the Church Archives.

The **Holdings Audit Project**, and the need to address immediate space issues, led to the reorganization of our "flat file" storage of oversize prints, drawings, architectural plans, posters, and episcopal consecration certificates. The Archives currently houses 40 drawers of material (in Austin). Once again, significant portions of the material had accumulated as older legacy filings that were not inventoried or appraised. Processing this collection will allow us to maximize the flat storage for new material and obtain an accurate listing as part of our overall inventory control.

Acquisitions

Accessioning of New Holdings. The effects of past downsizing has accumulated and created backlogs in the core archival functions of accessioning, appraisal, organization of records, and cataloging. We are troubled to report that the slide continues. As of August, the Archives was a full three years in arrears in our intake accessioning of new collections and holdings.

*Thus far in 2014, we have added approximately 59 cubic feet and 485 GB of electronic records to the Archives in Austin. The 2012–2014 backlog stands at approximately 309 cubic feet of analog records and approximately 12.5 TB of electronic data.

Donor Tracking and Rights Management. We are near completion on an important project to update our donor files for rights administration by creating a master index of all donors with data on provenance, copyrights, access provisions, and other agreements.

Acquisitions-in-progress.

A conversation started in 1997 is bearing fruit. Ms. Betty Morris has donated the 20th century archives of the **Rev. Peter Gray Sears**, who served in a number of churches in the South. The collection and features among other items his relief work with the Church in Northern Mexico at a time of heightened distrust by the national government.

Renewed conversations are underway with the granddaughter of a DFMS missionary from the 1920s in South Dakota, California, Hawaii, Latin America and Liberia.

Efforts continue with the *Association for Episcopal Deacons* in which we have had to contend with a discussion about "national church" concerns, but these were easily handled.

The Archives has worked with the Diocese of Connecticut to acquire the colonial and early federal papers of the **Rev. Samuel Jarvis** and related archives that they believe would be better preserved and accessible with the Archives than in their new quarters.

Conversations have begun with the family of the **Rev. Myron Bloy** to acquire his personal papers. Bloy was very influential in the development of higher education ministry (formerly with MIT) along with Bishop Fred Lawrence, and an early director of the Church Society for College Work.

Contact was initiated with the family of the **Rev. Kermit Smith** and led to the acquisition of his contemporaneous journals while serving as the hospital Chaplain during the country's first heart transplant operations in Houston.

We have had further negotiations, which began in 1996, with the family of the **Rev. David Pendelton Oakerhater** regarding the acquisition of his diaries. There is promise in this but also much competition from other institutions.

The Archives acquired the Papers of the **Rev. Lee A. Belford** related to his involvement in The Episcopal Church's Prayer Pilgrimage in Mississippi (1962) as organized by ESCRU.

After a tough, hand-holding, nearly four-year negotiation, the Archives has very recently received 33 boxes of **Bishop Bland Mitchell's** (Diocese of Arkansas) papers. Mitchell (b. 1938, d.1956) corresponded widely throughout the Church and was involved in early efforts to address education and human rights issues for African Americans among other interests.

Digital Archives

***Acts of Convention 2012.** Having received the Journal minutes in June, the project team spent the summer months completing work to convert the 2012 resolutions of General Convention to the *Acts* database. All data has been gathered and normalized. The staff completed an audit of every resolution and repaired the legislative history. The contemporaneous paper records proved invaluable in authenticating the computer generated data. Quality control review of the database is now set for October 1, which is almost too close to the time when CCABs will need the data to tap for their Blue Book preparations. Here again, the curators were ably and crucially assisted by the part-time staff.

Blue Book 2012. One of the new Digital Archivist's first assignments was to add the 2012 Blue Book or CCAB *Reports to General Convention* to the existing Digital Archives. This was a more straight forward process as no attempt is made to correct or repair text. The reports are normalized to link them with previous generations of interim bodies (allowing for name changes)

and topically indexed. The Blue Book database was completed on September 15 and is awaiting posting to the Archives website with the *Acts* in early October.

Digital Preservation

Four major digitization projects on text corpora have been initiated in 2014. These include three official published works of the DFMS and General Convention: the newspaper *Forth*, 1940-1960 (a predecessor to the *Episcopalian*); the Constitution and Canons, 1964–1997; and the *General Convention Daily*, 1954-2009. In addition, we have committed to digitizing a large collection of Ecclesiastical Trial Court records.

Online Access and Technology

Archives Website: Development of a Content Management System (CMS). Work on the new Drupal site for the Archives has been delayed due to our staffing situation. With the Digital Archivist now on board, the curators have held a number of work sessions to get back on track with the CMS development. We brought current a punch list, visited the design issues and identified the next steps before roll out, which we hope will be the first quarter of the 2015. We are tentatively planning a two-week intensive data migration session in mid-November if other matters do not intercede. In the meantime, we are keeping current with the technology versioning by updating Drupal's core software and add-on modules (about 100 updates) to be able to integrate the current stable releases with our custom site themes.

E-Archiving Project. With Executive Council's allocation earlier this year of \$80,000, the staff began planning the introduction of an e-records acquisition "workbench" of customized hardware and a suite of open source tools for the intake of DFMS network records and external DFMS data stores. Ideally, this system will be connected to the DFMS network with the Archives assuming responsibility for software applications and data management with network data transfer and enhanced connectivity to Austin. The system will also connect to protected, repository-level storage and back-up of the data in Austin, with the goal of directly connecting to the Archive's digital repository. A draft specification for the workbench is currently under review. The staff is engaged in evaluating NY network data storage and visiting installations of e-archiving systems to evaluate software tools and forensics workflow approaches.

The Archives learned that IT in New York will be deploying a new suite of software for use by DFMS staff. We await more information on how Microsoft Office 365 will allow for data migration and preservation in Cloud environments, which could involve third-party software and consulting expenses.

Staff in Austin have been upgrading technology to prepare for the anticipated intake of accumulating electronic records. The Archives has identified the need for 24 TB of storage to accommodate historical data currently held on various external storage devices. The creation of the digital repository will not begin until early 2015.

Records Administration

Records Retention. We have endeavored to complete the draft DFMS Records Schedule in order to pass it along to in-house counsel and managers for review. Fine-tuning work continues on this project.

We assumed custody and management of a large cache (25-30 cubic feet) of DFMS videotapes that were unwisely and intentionally secluded in the ECC sub-basement, where summer temperatures can exceed 100 degrees. This unacceptable practice, given the availability of the Archives for storage, represents negligent behavior toward these important intellectual property assets of The Episcopal Church.

Staff worked to finalize an e-records file plan for the Asset Management area of the Finance Office with a goal of reducing duplication and increasing quick access to stored data.

The staff completed an audit of all data and file transfers from DFMS offices to Archives in 2013. This included the unusual survey, appraisal and transfer of DFMS records of the Asiamerica Ministries office that had been removed and stored with a parish in Manhattan.

Administrative Operations

Budget. The Archivist participated in the Executive Council's ongoing budget preparations for the 2015 – 2018 triennium with Board and Executive Committee input. The next triennial budget contains requests for Electronic Records Archiving and increases in the Archives for storage (\$7,000/yr), which we anticipate rising due to our over-capacity in Austin and New York. Other operational accounts remained nearly level funded.

The Budget of The Episcopal Church currently sits with the Executive Council's FFM Subcommittee on Budget. It incorporates each of the standing committee's budget priorities and each area's requests. FFM will report to Council at the October meeting and a budget will be adopted for hand-off to the Jt. Standing Committee on Program, Budget and Finance.

New Archives Facility / Executive Council AN025 Working Group. The Archivist has worked with DFMS Consultant Lang Lowery and AN025 Working Group Chair, Pan Adams McCaslin to explore further the possibility of an Archives building on the downtown block purchased by the DFMS for that purpose in 2009. Mr. Lowery has visited the Archives and Austin several times, obtained previous work on site assessment, architectural design studies, and other project documents, and met with local developers and others on the local property development and financing market. He has communicated his progress with the Archivist regularly. The current prospect is to pursue the plan to combine a revenue-generating parking garage with an archives structure and other city requirements for retail frontage and setbacks. The Committee and the Board will assess these proposals in the Fall and report to Executive Council. The Working Group has been asked to look at alternatives if the Austin site proves financially unworkable.

Staffing. A new Digital Archivist was recruited and joined the staff on July 7. Whitney Hughes comes to the Archives from private industry with a technology systems background, but she is also returning to her first career goal as she earned her advanced degree in information science with a specialization in archives management. This appointment filled a position that was vacant for eighteen months. Our part-time staff has been a tremendous asset and their loyalty during this period of transition made a large difference in maintaining staff morale and progress of the Archives operation.

Systems Administration/Infrastructure/Technology. The staff oversaw the construction of a new computer operation room with expanded server and device space, significantly better air circulation and power feed. We have recently installed a new web server to handle our email and website needs and anticipate that this investment in time and hardware will carry the program forward for at least the next six years.