

# THE BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

## Membership

Ms. Pan Adams-McCaslin, <i>Chair</i>	Western North Carolina, IV	2021
The Rt. Rev. R. William Franklin, <i>Vice Chair</i>	Western New York, II	2021
The Rev. Dr. Brian K. Wilbert, <i>Secretary</i>	Ohio, V	2021
Ms. Anne E. Bardol	Northwestern Pennsylvania, III	2021
Ms. Kay Bishop	California, VIII	2021
Dr. Frederick W. (Ted) Gerbracht, Jr.	Long Island, NY II	2021
Mr. Lawrence R. Hitt II, Esq.	Colorado, VI	2018
The Rev. Dr. Robert F. Pace	Northwest Texas, VII	2018
The Hon. Byron Rushing	Massachusetts, I	2018
The Rev. Robert L. Sessum	Lexington, Kentucky, IV	2018
The Rt. Rev. G. Porter Taylor	Western North Carolina, IV	2021
Mr. Mark J. Duffy, <i>Canonical Archivist, Ex-Officio</i>	Texas, VII	
The Most Rev. Michael Bruce Curry, <i>Ex-Officio</i>	North Carolina, IV	
The Rev. Gay Clark Jennings, <i>Ex-Officio</i>	Ohio, V	

### CHANGES IN MEMBERSHIP

The Rev. Jennifer Baskerville-Burrows, Chicago, resigned in 2016. The Rt. Rev. Gary R. Lillibridge, West Texas, resigned in 2017.

## Mandate

The Board of the Archives of the Episcopal Church is authorized under Canon I.5.3, which states that the Board has the duty to set policy for the Archives, elects the Archivist of the Episcopal Church, gives direction to and sets forth the terms and conditions for the work of the Canonical Archivist. The Board meets annually or more often as required, elects officers, and creates committees as necessary. The Archive Board adopts procedures consistent with the Constitution and Canons and reports to the General Convention, and the Executive Council, through the office of the Executive Officer of General Convention. The expenses of the Board and the Archives are shared by the General Convention and the Executive Council.

## Summary of Work

### **MEETINGS**

The Board met twice in person and three (3) times by teleconference in this triennium. The Executive Committee (comprising the three (3) officers, Board member at large Larry Hitt, and the Archivist) conferred in telephone conference nine (9) times. The Chair communicated regularly with the Canonical Archivist to provide counsel, coordinated his annual performance review, and assisted in weighing strategic priorities in light of the many demands of the building program, fund-raising, and operations. The Archivist has attended meetings of Executive Council and reported to its committees on behalf of the Board.

The Board's membership and officers underwent an unusually high turnover in this triennium due to transitions and resignations, which required the new members to do some fast learning as we discerned our way through an organization in transition. The Board's time together was spent examining four areas of concern. These were: (1) the work of the Archives and the Archivist, (2) progress on the evolving building enterprise, (3) the first truly serious focus on fund raising and development; and (4) governance responsibilities and clarity of authority. The building and fund raising are obviously linked and are discussed together below. We list them as separate concerns to emphasize the additional responsibilities and expectations they have on staff, and the unexpected insights we have gained from exposure to a wider stakeholder community within the Church. The Board's education about the potential for evangelism and reconciliation in the Archive's mission has been an eye-opening and rewarding experience for all the officers and members.

### **OVERSIGHT AND DIRECTION**

An important part of every meeting with the Archivist is a review of the work and future direction of the archival program and its staff. The Archivist's report, which is attached, speaks to the scope of the duties and accomplishments in the triennium. The detail is a summary, however, and does not do full justice to the enthusiasm and dedication of our talented staff and their commitment to the mission of The Episcopal Church.

The Board has noted in its discussions with the Archivist several areas of shared concern. With the loss of staffing during the economic downturn, he was asked to identify the impact on program and these impacts have occurred, specifically in the area of records intake and processing, cataloging, and inventory management. These basic archival functions began falling behind just at the time when electronic media and advanced technology tools became the principal and routine way of keeping records. The added responsibility of digital records management has strained the staff who must continue to pay attention to the accumulated records of our analog past.

In response, the Board supported a 2019-2021 budget request to restore the Archives staff to a full complement by adding a technical specialist position. Acting on initial feedback for budgetary restraint from the Executive Council's finance committee, we revised our request and opted for less costly use

of consultants. We are convinced, however, that temporary worker contracts beyond their current limited use are not conducive to consistent quality and steady management of specialized archival operations. A positive development in 2017 was the change in the Episcopal Church Center's IT office, which could help bridge major gaps that the Archivist has identified in the organization's electronic records systems.

### **ARCHIVES BUILDING AND FUND RAISING**

The Board has greeted with enthusiasm Presiding Bishop Curry's endorsement of the Archives building project. Together with President Jennings's long-time support of the Archives, we have in place a team of leaders to assist the Archivist in achieving a favorable outcome for this long-delayed goal. The Archivist's attached report gives specifics on the recent benchmark events.

The Board's role has been to receive reports from our diligent and innovative project consultant, the Rev. Lang Lowrey, and to evaluate our progress in achieving the best archival repository the Church can construct to safeguard our past. We have pressed the consultant to hold fast in his negotiations to accomplish several priorities:

- Obtain the fullest possible utilization of square footage for the storage *and* educational program of the Archives as the central repository for the historical records of The Episcopal Church.
- Provide sufficient additional space to augment archival functions with meeting and exhibit areas that are welcoming to the community of Episcopal visitors and the public.
- Negotiate property development that sheds light on the needs of and does no harm to the local population, many of whom are citizens without homes and permanent shelter.
- Provides sufficient amenities for staff and sponsored research such as parking, transportation, and accommodations to make it amenable to easy access and staff recruitment.
- Create a sustainable building project by utilizing environmentally sound building materials and providing endowment funds to support maintenance and upkeep of the building and its systems.

Sustainability of program and operation has been a guiding mantra since the first building design plans were drawn in 2009. The Archives Board and the several committees tasked to guide this development have been faithful in pressing for a plan that does not financially burden the future Church. While the General Convention and Executive Council have generously funded the programmatic budget of the Archives, we recognize the need for endowment to carry the costs of a bricks and mortar operation.

What has been interesting to the Board is the information the Archivist and fundraising staff have received in interviews with major donors in the early phase of fund raising in 2016-2017. We learned that donors are highly concerned that their dollars not only go towards a project that will make a difference, but also that the Domestic and Foreign Missionary Society [DFMS] will use the funds now

and in the future exclusively for the Archives. They want to know that the Archives is governed appropriately and that the Church has the structures in place that guarantee a professional operation. These are goals the Archives Board shares and which compelled us to look seriously at our governance responsibilities and oversight accountability.

The Church is likely to begin construction of a 64,000 sq. ft. state-of-the-art archives building with meeting space in a highly visible urban setting. The facility will have a realized value in excess of \$30 million at opening – with no capital expenditure by the Society. It will become a more valuable asset in years to come. The management, care, and planning for a facility of this magnitude has heightened awareness among Board members and others in the organization. A positive partnership with the DFMS Development Office has led to the first professional and hopeful measure of progress in meeting a fund-raising goal of \$12 to \$15 million for endowment.

The challenge remains, therefore, for the Board and Church to imagine a stable future in which the Archives Board can attract ongoing financial support from Episcopalians and granting agencies for its specific area of historical mission. The General Convention’s authorization in resolution in 2012–A162 to establish a foundation-type, nonprofit DFMS subsidiary received careful independent legal review. The proposal would assure 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), while enhancing gifts and effective management of assets. It would be extremely valuable if Executive Council and the administration endorse the wisdom of this plan or an alternative model of long-term sustainable support.

#### **FURTHER STRENGTHENING OF GOVERNANCE**

The Board devoted much time in the triennium addressing a concern expressed at times by Executive Council members, donors and management about the Archives Board as a self-governing entity within the General Convention and the DFMS. At moments of institutional change such as occurred with Presiding Bishop Curry’s election, questions of clarification in direction and accountability are expected. The Board is also highly sensitive to the impact of a center for The Episcopal Church that is dedicated to advancing its identity and visibility outside the administrative headquarters in New York.

The Archives Board’s Executive Committee, in consultation with the Canonical Archivist and Director, has explored these matters at some length and shared its thinking with the Presiding Bishop. The result is a clearer understanding of the Board’s stewardship responsibilities, which are framed in the 1985 Canon on Archives. The Archivist, serving as the professional and fiduciary agent, is both a member of the Board and an employee of the Domestic and Foreign Missionary Society [DFMS]. As executive director, the Archivist brings the interests of all the principals in the organization into a creative balance to achieve the mission of the Archives and the Church.

The Archives of the Episcopal Church exists in an ecclesiastical government that is historically a blend of hierarchical and mutual interdependence. Since its inception, the Archives has been located under

the oversight of a body that has exercised its historical mandate with some degree of independence from the administrative bodies of the Church. This once-removed distance from corporate management control is similar to civil governmental archives. It is also typical of institutional archives in religious bodies (as opposed to special collections libraries). The Episcopal, Presbyterian, Methodist and Southern Baptist archives all operate with board structures that oversee the operation in close cooperation with their mission and administrative units. The General Convention's Archives Board underscores the broad interpretation of, and accountability to, "the Church".

The Canonical Archivist has executive responsibility for the curatorial operation, policy development and implementation, staff oversight and administration of the Church's archives and its records management program. While the Archivist reports to the Board in the exercise of the office, he or she is the designated custodian of the corporate records and acts as a DFMS employee. Thus, the Archivist has a legal and fiduciary accountability to the Chief Executive Officer (the Presiding Bishop) or his or her designee. As a member of the Board, the Archivist also reports to the appropriate Standing Committee of Executive Council on matters of importance affecting the archives or the management of DFMS records.

These multi-directional reporting relationships are critical to ensure confidence, trust, loyalty, and support for an operation that oversees records of high confidentiality across the organization, protection of privileged corporate communication, and professional management of the intellectual assets of the Society and The Episcopal Church. They have also proved helpful in key administrative decisions, particularly affecting finance, budget, and information management. The Board's independence from internal political influence and protection of the Archives' professional program from interference are further buffered by the Board's reporting channel to Executive Council and General Convention, which is strengthened by the position of the Executive Officer of General Convention, through whom it reports to these bodies.

The Presiding Bishop's vision to bring The Jesus Movement and evangelism into all aspects of the Church's ministry has called for flexible organizational structures. Developing a consensus on an understanding of the Archives' unique position in the governance structure of The Episcopal Church in a descriptive way to capture its multi-directional accountability has been a point of continued effort and tested relationships even during this triennium. The Board is committed to working with Executive Council and the presiding officers to realize future structures for the Archives that will serve the life-giving mission of the Church.

## Budget

### BUDGET APPROPRIATION REQUEST, 2019–2021 TRIENNIUM

Archives and Records Management	
Salaries and Benefits	\$2,664,226
Rent and Storage	210,000
Operations	475,035
Information and IT Services	73,776
Digital Archives/Electronic Records	375,000
Total	\$3,798,037
Board of the Archives	
Board Meetings	\$36,000

## Report of The Canonical Archivist

Solid progress can be reported in this triennium towards achieving the goal of a home repository for the Church’s archives. It is an accomplishment that occurs appropriately at a time when much good is happening for The Episcopal Church. Adversarial and broken relationships have receded in the flood of energy that has accompanied the call for a Christ-centered evangelism that embraces all and repositions the Church and its bodies toward repairing the worn fabric of Creation. The call to heal and serve others makes the inward-dwelling struggles over structure, authority, and position seem like time-worn vestments of another age. This is a gift to all those who, like the Archives Board and staff, are engaged in the reconciling mission of the General Convention and the Domestic and Foreign Missionary Society [DFMS]. Even as we approach a moment when the Archives’ physical security and visibility are within our grasp, our efforts in education, preservation, and institutional support are more extensive than at any time in the recent past.

When the General Convention enacted the new canon on the Archives and established an oversight Board in 1985, it recommitted the Church to the care of its institutional history. That carefully crafted canon echoed a bold 1835 precedent when the nascent Episcopal Church first claimed its history by naming a conservator of archives to shape an identity fit for a new nation. In shaping its mission in the 1990s, the Archives Board adopted two (2) visionary goals. The first was to renew the entire collection management, acquisition, and research program to capture the undocumented voices of The Episcopal Church and to acquaint Episcopalians with a part of their history that had been marginalized by writers, scholars and story tellers. The second, more daunting goal was to elevate the Archives

from a best kept secret to a place of prominence, visibility and voice. A team came together in 2006 to create a visionary but achievable plan to build the Church's first archival repository. The ups and downs of the ensuing decade did not thwart galvanizing leadership of key individuals on the Board, the Executive Council, and from other quarters of the Church. Big picture thinkers, supported by thoughtful experts, took a measured risk on a reasonable plan based on institutional sustainability and a belief in the historical record as essential to the Church's culture of evangelism.

We expect to find fruition in 2018 with the start of construction on a new and permanent facility for The Archives of The Episcopal Church. The Archives ability to realize the potential of its historical and educational programming will be greatly leveraged by bringing all the historical collections together for the first time. A building designed to function as an archives rather than a storage box will allow us to effectively manage and preserve the Church's holdings, which date from the 18<sup>th</sup> century and earlier. We will also be able to welcome Episcopalians and other visitors to a highly visible public venue where our world-wide story can be prominently featured. The year ahead requires us to raise an endowment for the future support of the building and historical activities for the whole Church.

If this report were only a measure of the time and energy of the past triennium, it would be largely a report on the progress we have made with the building and development program. Much more has been accomplished, however, in our historical and information management duties. Our hope is that the next triennial report will bring to a conclusion this long journey to achieve the most basic archival requirement: an actual place called "the archives." It will be a significant accomplishment to have obtained a research center for The Episcopal Church at virtually no required cost to the DFMS or the General Convention.

### **RESEARCH SERVICES**

The Research Services desk responded to one thousand (1000) research questions in 2015, eight hundred and two (802) in 2016, and five hundred and fifteen (515) in 2017. The annual counts show a steady decrease from previous years. The difference owes to the use of a more precise contact form on TEC's website and the Archives' site (<http://episcopalarchives.org>), which improved filtering of ephemeral questions. New staff expanded use of digital resources on the Archives' website; and adherence to a free research time limit of thirty (30) minutes also account for these smaller numbers.

### ***Institutional Research***

The raw totals above belie the scope of the priority research that we perform for internal governance, administration and legal inquires. Church agency and interim body requests involve considerable original research, digitization, and consulting and although they amount to just 20% of the requests, they account for about 70% of the time. Internal requests typically result in a formal Archives Research Report and it is not unusual that they are accompanied by a digital library of resources for interim bodies. Institutional requests during the three (3) year period 2015–2017 led to forty-three (43) research reports for bodies or officers of the DFMS. This activity is supplemented by the many

numerous research reports prepared in 2015 leading up to General Convention. The range of topics is indicated by the following partial list of research products.

- Episcopal Indian Boarding Schools were researched for a compilation in support of Native American ministry reconciliation around the institutional practice of racism.
- A website and report on anti-racism efforts informed a Convention resolution to restore a canonical mandate on multicultural training in preparation for ministry.
- A web microsite and digital library was created for the Task Force on the Episcopacy.
- A status report was prepared on the trial liturgies for the Church Calendar over the past decade affecting *Lesser Feasts and Fasts*, *Holy Women*, *Holy Men*, and *Great Cloud of Witnesses*.
- The history and agreements on the source and use of United Thank Offering [UTO] trust funds was reported including the historical relationship of UTO, ECW, and the Women's Triennial.
- Digitization and case history research was conducted for the White and Dykman Revision Committee on Ecclesiastical Discipline and included a website for future data sharing.
- The relationship of General Theological Seminary to General Convention was reported.
- A white paper and research data on GC resolution 2015–D037 addressed best practices for when amending names and identity in parish and other Church records.
- The genesis of the office of Bishop Suffragan was detailed noting periodic reexaminations of the purpose and jurisdictional standing of the office.
- The Archives commented in detail for the Standing Commission on Liturgy and Music's proposal to analyze church service data to prepare for Prayer Book revision.
- A history of the Church's ethnic and social service ministries and the related interim bodies was completed for the Structure Commission.
- Staff traced the history of the Government Relations Office for a self-study. The report covered the 1978 origins through its most active development during the 1980s to the early 2000s.
- Historical reports and some websites were prepared on the following topics:
  - Election and installation practices of Presiding Bishops
  - Episcopal Church's Response to the Treatment/Care of Alcoholism and Alcoholics
  - Funding system for the Budget of The Episcopal Church
  - Intention, use, and management of the Conant Fund Trust
  - Authorized agreements and texts of ecumenical dialogues and consultations
  - General Convention's provincial governance system
  - DFMS's minority bank investment program
  - The Episcopal Church in Cuba



### **External Research**

Among the external inquiries were several that entailed extensive use of the holdings including: the Episcopal Church's oversight commission for Native Americans; Martin Luther King, Jr.'s relationship with the Episcopal Society for Cultural and Racial Unity [ESCRU]; the Church's historic stance on slavery; the early missions in the Philippines; the Cape Palmas mission in Liberia; Cathedral Films; Hudson Stuck's Alaskan diaries; the Protestant response to immigration in the early 20th century; the history of Psalter revision; the life and work of James DeKoven; Paul Rusch and The Episcopal Church in Japan; William Stringfellow; St. Paul's Normal School in Virginia; Mary Elizabeth Wood and The Boone Library; the history of the ministry to the deaf; the Liberian Church after 1980; the Japanese Episcopal Mission in Los Angeles; and the Church's expansion of Christian social relations ministry.

### **Website Research**

The Archives' website presents a compelling indication of the reach of our information services. Principally through the Digital Archives (over 40% of current web use), historical data can be easily searched for use in parish education, advocacy on public issues, Church-wide documentation standards and public inquiry. The number of unique URL hosts (or individual users) served by the Archives' website grows incrementally:

- 102,278 unique individual users in in 2015
- 113,751 in 2016
- and a dramatic increase to 229,763 as of December 1, 2017.

Another surprising statistic is a new count of document downloads from the website, which amounted to 193,571 digital objects in 2017. The recent jump in users and downloads is highly likely the result of newly published data and the release of a refreshed Drupal-based website.

### **DIGITAL ARCHIVES AS EVANGELISM**

Digital content publication is the main vehicle by which the Archives communicates important themes in its historical holdings and collaborates with Episcopal agencies, offices, and donors to create special exhibits and corpora for publication. The curators are intent on achieving high quality control when authenticating published records as the Digital Archives are used as trusted surrogates for the originals in historical research. Digital projects for the period 2015–2017 include the following:

*Website Redesign.* No sooner had the Archives created its first content managed website in May 2016 then we recognized its limitations. A Drupal site re-design resulted in version two (2) in November 2017. The site is now conveniently accessible by mobile devices, full website search capability, intuitive navigation and client contact through a query interface.

*The Acts of Convention 2015, Digital Archive.* The Archives completed an update to the *Acts of Convention, 1976–2015* database in October 2016, adding three hundred and fifteen (315) proofed and

authenticated resolutions from the 2015 General Convention. Analysis of user statistics led to an enhanced database for this edition by retrospectively linking all “A” resolutions to the related *Blue Book Reports* for the years 1982–2006.

*Reports to General Convention (The Blue Book) 2015, Digital Archive.* The Archives completed data migration, validation and indexing of the *Blue Book* reports from the 2015 edition. The reports are the most frequently downloaded documents as interim bodies prepare for General Convention.

*Constitution, Canons and Rules of Order 2015.* The Archives assisted the General Convention Office at a time of staff transition to edit the *Journal* minutes in the fall of 2015. This work made it possible to produce a timely edition of the *Constitution and Canons* in January 2016. The Archives completed a retrospective review of all three hundred and four (304) internal references and citations, missing one reference and only two (2) other verifiable errata. The 2015 edition will be the last volume edited by the Archives, which has overseen this work since 2003. Archives staff prepared a manual to guide future editorial work.

*The Resolves of Council, 2012–2016, Digital Archive.* The curators updated and expanded the *Resolves* database with the addition of three hundred and eighty-six (386) resolutions adopted over the course of fifteen (15) Executive Council meetings. Council resolutions were verified and standardized with Archives metadata. Council-approved policy statements were attached as a new supplement to the 2012–2016 votes.

*Venture in Ministry: John Maury Allin Web Exhibit.* In May 2016, the Archives published a major exhibit on the 23rd Presiding Bishop. *Venture in Ministry* weaves historical text and rich media into an exploration of Bishop Allin’s leadership as he attempted to navigate the Church through arguably its greatest period of institutional change in the 1970s and 1980s. Exhibit curators negotiated the historical role of a conservative, mission-oriented leader who found his best instincts and experience outpaced by events. The project was funded in part by a 2011 grant from the Allin Foundation.

*The Senior House: House of Deputies and Women’s Ordination Web Exhibit.* The Archives published a history of the House including biographies on the presidents and a chapter celebrating the 40th anniversary of the vote to ordain women. The 2016 exhibit explores the history of women in the House of Deputies from their seating at General Convention to the priesthood.

*Thy Will Be Spoken: A Ministry of Preaching: John Rowan Claypool Web Exhibit.* In 2016 the Archives published an exhibit on the influential career of this preacher, teacher, and spiritual counselor. The exhibit features photographs, writings, and audio recordings from selected sermons. The Archives received The John Claypool Papers from his family in 2011.

*The Church Awakens: African Americans and the Struggle for Justice (2017 edition).* Technological obsolescence required that the Archives migrate this popular 2008 web exhibit to a more stable web

application. Using an open source system (Omeka), the curators revised the site, added search functions, and updated content throughout. Twenty (20) verified additions were made to the list of Historically Black Parishes and five (5) biographical profiles were created for the leadership gallery.

*Ecclesiastical Trial Court Records Digitization Project.* The primary audience of the digital archive of case records is Church attorneys, chancellors and canonical advisors who litigate disciplinary cases. It is a backbone resource to the committee revising the standard White and Dykman annotated canons. The Archives developed an electronic library, located “lost” cases and created extensive standards for future work including a rigorous protocol to redact and manage sensitive personal information.

### **DIGITAL ACQUISITION AND PRESERVATION OF ELECTRONIC RECORDS**

Archives staff developed the beginnings of a trusted digital repository to house permanent electronic data stores. Intake workstations have been installed in both the Austin and New York offices and connectivity between the two (2) offices was implemented with the recruitment of new IT staff in NY. Storage servers were configured for a local data repository, which must accommodate a current capacity of approximately seventy-six (76) TB of original and preservation copy data. Open source software programs were customized to create high quality metadata during acquisition, and the code was shared with the wider archiving community with credit to The Episcopal Church Archives.

The curators developed new accessioning standards for electronic records with defined minimum metadata requirements. These new tools were implemented in New York in March 2017 and will be implemented in Austin at the start of 2018. An obstacle for archival management of electronic records has been a recalcitrant headquarters IT department. Management introduced a dramatic change in that area at the end of 2017, which coincided with an Archives decision to adopt an open source software system (Arkivum) to automate the storage, integrity control, and dissemination of our permanent digital records. These developments allow us to make the first optimistic forecast for preserving DFMS historical records since the organization went fully electronic in 2008.

### ***Extranet Data Acquisition Project***

In February 2016, the Archives procured a secure transfer of the General Convention Executive Office’s Extranet (Rails) application of vital Church records. The Extranet is custom-built software that operates as a low-scale document collection and sharing tool. It has not been coded to standards for data retention or to act as a certified record-keeping system. Core data dictionaries and internal documentation were not created for the system. This essential metadata had to be created retroactively at a cost of several thousand dollars. In addition, multiple applications and third-party code necessary to run the Extranet were outdated, resulting in security issues and an added sense of urgency to establish a fixed operational instance of the program and data. The Archives managed to capture the Extranet with all software dependencies in a virtual machine environment, which will allow experimentation in data migration and processing. Data appraisal began in 2017 to determine permanent content. New system development is scheduled for 2018 to create linked data tables and a simple database container with a new search interface for permanent access to public information.

This application is an exemplar of severely flawed customized software that is not created for long-term data retention and does not follow common information governance standards including Executive Council’s 2009 software guidelines.

**Digital Preservation of Primary Historical Records**

Archival standards of replication, fidelity, and redundancy are used to reproduce records on a case-by-case basis, utilizing a menu of technology options to control for costs. Selection is typically driven by a combination of historical value, user demand, media obsolescence and the fragility or rarity of the original. Each new digital collection is accompanied by a finding aid and metadata. These materials will eventually find their way to internet publication. Preservation digitization of the following archival records occurred in 2015–2017.

- Cathedral Films, 1949, illustrated scrapbook and motion picture film, 769 GB
- Coalition 14 Records, 1972–1995, audio interviews, 2 GB
- Communications Office, Hurricane Katrina video, TEC response, 2015, 525 GB
- Constitutions and Canons of The Episcopal Church*, 1964–1997, 11 volumes, 47.3 GB
- Ecclesiastical Trial Court Records, 1852–2011, 8.19 GB
- Forth (Magazine)*, 1940–1960, 1.2 TB
- General Convention Daily*, 1958–2009, 88.4 GB
- General Convention, video recordings, 2009, 2012, 18 TB
- House of Bishops and House of Deputies, audio recordings, 1979, 325 GB
- John Maury Allin, audio and video recordings, 1961–1973, 2.85 TB
- John Eldridge Hines, 64th General Convention address, audio recording, 1973, 361 MB
- John Rowan Claypool IV, 1976–2002, audio and video recordings, 1.4 TB
- Liberia Mission, Records of the Order of the Holy Cross, 1920–1961, approximately 75 GB
- St. Louis Fellowship of Concerned Churchmen Congress, audio recording, 1977, 1.4 GB

**NOTABLE ACQUISITIONS OF HISTORICAL RECORDS**

From 2015 to 2017, the Archives acquired approximately two hundred and eighty (280) cubic feet of paper records and 27.72 TB of digital data. Formal accessioning of incoming records is approximately 5.75 years in arrears due to a shortage of staff for processing. An unusual note in this report is the deaccessioning and return of an eighty (80) cubic foot archive held on temporary deposit since 1976 for the Order of the Holy Cross. This was an unplanned one hundred (100) hour time commitment that served to illustrate why archival agencies do not generally accept materials on deposit. The following list is a sample of noteworthy historical acquisitions beyond those records typically received from the DFMS.

(2015)

- Papers of the Rev. Edward T. Adkins, re. Selma and Montgomery, 1965, .01 c.f., gift of the family
- Records of the American Committee for Kiyosato Educational Experiment Project, ca. 1940–1992, 6 c.f.
- Records of the Association for Episcopal Deacons, 2014, 1 c.f.

Records of the Association of Anglican Musicians, 2014–2015, 1 c.f.  
 Records of Cathedral Films, ca. 1950–1970, 3.5 c.f.  
 Records of the Committee on Sexual Exploitation (1991-B052a), 1991–1997, 3 c.f.  
 Records of the Consortium of Endowed Episcopal Parishes, ca. 1982–2009, 2 c.f., gift of James Calloway  
 Records of the Episcopal Church Building Fund, 1972–2007, 5.5 c.f.  
 Records of the Episcopal Conference of the Deaf, 2010–2013, 1 c.f.  
 Papers of Lucy Germany, ca. 1976–2007, 12 c.f., gift of the family  
 Records of the Girls' Friendly Society, 2009–2014, 1 c.f.  
 Letters of Frederic Dan Huntington, 1850–1872, .1 c.f., gift of Richard Mammana,  
 Records and Historical Collections, National Episcopal Historians and Archivists, 1839–2001, 47 c.f.  
 Publications and Curriculum of Seedlings, Inc., ca. 1978–2011, 5 c.f.  
 Records of the Standing Commission on Liturgy and Music, ca. 2005–2015, 1.5 c.f.

(2016)

Records of the Association of Diocesan Liturgical Commissions, ca. 1980–2002, 3 c.f.  
 Records of the Episcopal Church Building Fund, ca. 1889–1998, 34.5 c.f.  
 Episcopal Church Flag of St. James Episcopal Church, Standing Rock, n.d., donated by John Floberg  
 Records of Episcopal Women's History Project, Oral history of Olive Mullea, 1989, .1 c.f.,  
 Research Papers of the Rev. Susanne Watson Epting, ca. 1979–2002, 1 c.f., gift of author  
 Records of the Secretary of the House of Bishops, 2001–2015, 3 c.f.  
 Papers of the Rev. Daisuke Kitagawa and Family, 1920–2012, 1 c.f.  
 Papers of Deaconess Gertrude Mosher, 1869–2004, 1.25 c.f., gift of Sylvia Knight  
 Records of the National Episcopal Church Women, Secretary/Treasurer, 2009–2012, 1.5 c.f.  
 Records of President of the House of Deputies: Bonnie Anderson, ca. 2009–2014, 0.3 c.f.  
 Records of the President of the House of Deputies: the Rev. George Werner, 2000–2006, 2 c.f.  
 Papers of Dr. Krystyna Sanderson, photos of 9/11 Chaplains-Boots Project, 2001, .1 c.f., gift of artist  
 Papers of a Tennessee Clergyman, manuscript dairies, 1880s, .1 c.f.

(2017)

Records of Bishops Executive Secretaries Together, 2017–2017, <1 GB  
 Papers of the Rt. Rev. Edmond Browning, ca. 1970–2015, 8 c.f., gift of the family  
 Records of Episcopal Church Publishing (*The Witness*), 1990–2005, .5 c.f.  
 Records of the Episcopal Network for Economic Justice (ENEJ), 2009–2016, 3 c.f.  
 Records of Episcopal Women's Caucus and Province IV, 1993–2000, 1 c.f.  
 Records of the Girls' Friendly Society, c. 1928–2014, .35 c.f.  
 Papers of Dr. Charles R. Lawrence, II, ca. 1939–1985, 16 c.f., gift of the family  
 Records of Leader Resources, ca. 1997, 1 c.f.  
 Papers of the Rt. Rev. John Shelby Spong, ca. 1998–2015, 11 c.f., gift of the author  
 Records of the Standing Liturgical Commission, Prayer Book Revision, 1969–1976, .35 c.f.

**Canonical Deposit of Journals and Annual Reports**

Only forty (40) dioceses deposited their annual journal in 2015; thirty-eight (38) in 2016, and thirty-two (32) in 2017. Journals are increasingly published in electronic format and some of the deposits noted in the above numbers are received as electronic publications: ten (10) dioceses in 2015, thirteen (13) in 2016, and fifteen (15) in 2017. The Archivist has reported to Executive Council that diocesan journals and annual reports, which are required for an accurate view of the state of the Church, have become far less comprehensive and standard than at any time in the past.

**Records Center (NYC) Intake**

The Records Management Office manages the noncurrent records of the DFMS. It received a total of six hundred and sixty-nine (669) cubic feet of paper records in the 2015–2017 period. Electronic records amounted to 7.284 TB over the same period. Among the notable accessions were video files from the Episcopal News Service’s staff, legacy data from the Government Relations Office in Washington, and a substantial transfer of records from the Presiding Bishop’s Office, including Presiding Bishop Katharine Jefferts Schori’s electronic records. Most of the DFMS electronic data is unstructured text files and represents records of terminated employees who continued to keep personal stores of data on laptops and remote offices. A number of legal holds limited the destruction of obsolete records in the three (3) year period to one hundred and sixty-two (162) c.f. versus the typical four hundred and seventy-five (475) c.f.

**ACCESS TO PROCESSED HOLDINGS**

As the horizon closes in on the physical relocation of the holdings, staff concentrated attention on a continuing audit of holdings and organizing a number of important or large collections of material. Archivists completed review of legacy finding aids (created since 1960s) to standardize data and create electronic record copies for all three hundred and forty-four (344) fully processed record groups. The Finding Aids Reconciliation Project involved a retrospective conversion of paper inventories, the repair of poor descriptive information and updates from accrued notations over time. Restricted and confidential collections were reviewed and standard access language was applied to each record group to alert the reference staff. Alongside this project, the curators teamed up to create one hundred and seventy-five (175) new holdings profiles for the historical collections described in the browsable section of the website.

In 2016 and 2017, the staff prepared full archival finding aids for 141.3 cubic feet and 10.55 GB of historical records. Inventory-level guides were produced for an additional one hundred and sixty-one (161) cubic feet, resulting in an overall total of three hundred and five (305) cubic feet of organized records. This extraordinary quantity of arrangement and description occurred during a staff vacancy in the collection management position, which speaks to a team of talented part-time archival assistants. Finding aids were created for the following holdings:

- Archives Prayer Book and Liturgy Collection, 1695–2011, 22.5 c.f.
- Records of Cathedral Films, 1938–1999, 40 c.f.

Papers of the Rev. John Rowan Claypool IV, 1947–2011, 26 c.f.  
 Records of the DFMS, Specialized Ministries and Social Welfare Office, 1964–1982, 2 c.f.  
 Records of the DFMS, Stewardship Office, 1960–1989, 3 c.f.  
 Records of the Ecclesiastical Trial Courts, 12 cases, 1852–2011, 9.8 c.f. and 8.19 GB.  
 Episcopal Church Publications Collection, c. 1986–2004, 2 c.f.  
 Papers of the Rev. William Baillie Green, 1952–2011, 31 c.f. and 2.36 GB  
 Papers of the Rt. Rev. Everett Holland Jones, 1925–1984, 13.25 c.f.  
 Papers of the Rev. James Milton Richardson, 1934–1965, 1 c.f.  
 Records of the Rev. Malcolm Riker, 1963–1995, 8 c.f.  
 Records of the Standing Commission on Church Music, 1940–1981, 1 c.f.  
 Papers of the Rt. Rev. Albert and Elizabeth Swift, 1878–2002, 1.75 c.f.  
 Records of the United Thank Offering, 1971–1988, 2 c.f.  
 Papers of William White, 1764–1835, and Family, 1643–1939, 2.5 c.f. (a calendared collection)

The Archives obtained several fine book and pamphlet collections to augment its special library collection. These included gifts of Episcopal works deaccessioned by Sewanee University’s duPont Library and Church Publishing’s Morehouse imprint library. As Episcopal libraries winnow their collections to emphasize current works, the Archives is invited to select historical publications on polity, historiography, biography and provinces of the Anglican Communion. Approximately eight hundred and twenty (820) volumes were acquired in the three (3) year reporting period.

### **DFMS RECORDS ADMINISTRATION**

The Archives’ Records Management Office at the New York headquarters responded to three hundred and forty (340) office consultation requests in 2015, three hundred and forty-six (346) consultations in 2016 and three hundred and sixty-five (365) in 2017. These included assistance with electronic records, filing systems, data retention and transfer, and general information management. The office has been routinely integrated in new staff orientations and data transfer at the point of employee terminations. The New York-based archivist conducted three (3) major office surveys for Government Relations, Federal Ministries Chaplaincy and the flagship Miami Office of Episcopal Migration Ministries, which was closed on short notice. Other notable DFMS projects include:

- Content management of the online Employee Resources and Information Center
- Office 365 file system development for the Presiding Bishop’s office
- Consolidated DFMS grants database as an online application
- Payroll data migration to a new external vendor
- Episcopal News Service data conversion, capture and transfer
- Appraisal of Basecamp software applications
- Conscientious Objector Registration Standards for the Young Adult/Campus Ministries Office
- Data management, retention and privacy for Episcopal Migration Ministries
- Data privacy and retention for event registration for the Youth Ministries Office

**Corporate Information Loss and Risk Assessment**

The central offices operate in a decentralized information ecology with no reliable consensus on information governance rules. The Archives is required to maintain a high-level map of the Society's distributed e-records, which are held in cloud-computing applications, a variety of personal email accounts, and vendor business software. The map is woefully incomplete due to the lack of inter-departmental data coordination. Especially concerning is data loss and confidential data storage on local computer drives (remote offices, laptops). Lack of software training leaves employees looking for work-arounds outside the DFMS systems. Such practices have been inimical to both archival retention and data destruction protocols for sensitive electronic records. We are hopeful in the next triennium to address these concerns at an organizational level with the recent appointment of a new COO and changes in IT staffing.

**OUTREACH**

The Archives responded to two hundred and thirty (230) requests for individual consultations from parishes, dioceses, and Episcopal Church organizations between 2015 and 2017. The consultations relate to a variety of questions on the management, retention, and preservation of organizational records. Managing electronic records is a frequent issue raised by stakeholders affecting privacy, digitization standards, copyright, and third party reproduction. The Archives used Facebook for social medial outreach. The three (3) year period led to a marginal increase in fans, or "likes," from 1,493 (2015) to 2,530 (2017). An effort was made to create posts that showcase the Archives' unique holdings as they relate to events in the Church and community, including several series to highlight General Convention themes, Refugee Day and the Episcopal Church's history of refugee aid, the House of Deputies, and women's ordination anniversary.

**A SUSTAINABLE BUILDING PROJECT**

A third and hopefully final round of development planning for an archives building in Austin emerged with vitality in this reporting period and represents a considerable investment of staff time. Beginning in 2015, Consultant the Rev. Lang Lowery of Verta Group was engaged to examine feasibility of a development plan to attract a high-end investment partner or purchaser of the DFMS-owned lot in Austin. The lot was originally purchased in 2009 on a line of credit loan of \$9.5 million. In a May 2015 meeting, the DFMS COO stated his opposition to fund-raising opportunities for the additional expenses associated with a new building and invoked the Executive Council's permission to sell the land if values warranted that outcome. A marketing proposal was circulated in September and received positive developer response into January 2016. In this same month, a change in the DFMS management opened the way for Executive Council's re-commitment to the Project, and in March, it voted to pursue the Austin building and a fund-raising plan in preference to a sale. The Canonical Archivist became actively involved with the consultant in overseeing the project and fund raising on behalf of the DFMS and the Archives Board.

With Executive Council's and Presiding Bishop Curry's support, the project has moved steadily in a positive direction. By October 2016, a revised building program was prepared with the architects of



choice (Studio 8 of Austin) within a revised footprint of approximately sixty thousand (60,000) square feet of net useable space. In February 2017, the DFMS signed a purchase and sales agreement with the selected Austin-based developer. Since then, the DFMS has worked with the developer and the City of Austin to obtain crucial land use accommodations to offset the known constraints of a public alleyway and a view corridor that bisect the lot. A positive recommendation on these allowances was made by city officials in December 2017, setting the stage for finalizing all financing and common area agreements in 2018. Parking lot revenue continues to support the DFMS's share of these preliminary operational costs. The consultant has been diligent to protect the Church's interest by stipulating a withdrawal of the land sale (now valued at about \$28 mil) if DFMS stipulated conditions are not met before the end of 2018.

### ***Fund Raising for Development***

The DFMS will be relieved of all construction costs by trading the land investment made a decade ago. Securing the building for the future is critical, however, to prevent an impact on future Church budgets. Beginning in October 2016, a significant Archives staff commitment was made to fund raising with an endowment goal of \$12–15 million for future care and enhanced programming amenities. Working with Director of Development Tara Holley, the Archivist reworked the case statement, developed marketing materials, met with project staff, prepared prototype renderings with the architects, and met with many dozens of contacts and potential donors while developing the first useful donor data base for the DFMS. The professionalism of the current Development Office staff and dedication to this Executive Council priority is unparalleled compared to any previous DFMS effort. The campaign schedule calls for us to broaden our appeal beyond the silent phase of major gift solicitation to a nation-wide appeal in the second half of 2018. From 2015 to 2017, the Archives acquired approximately two hundred and eighty (280) cubic feet of paper records and 27.72 TB of digital data.

### **ACKNOWLEDGMENTS**

The Archives curatorial and technical support team accomplished an enormous amount of work in this triennial period, from assisting with unanticipated post-General Convention publications, to maintaining a high level of research for Church bodies, to gearing up archival operations in preparation for a possible move. Special mention is owed to Administrative Deputy David Hales for his diligent and tireless assistance in regular tasks and the supplementary tasks pertaining to the building plans and fund raising. Our curators have excelled in meeting the challenge of electronic records archiving and preservation: Corrinne Collett who directs the Records Management Office in New York and Whitney Hughes who, as Digital Archivist, directs our digital content management. In April 2016, we added a new staff member in Chris Paton who dedicated herself to a year of learning as Archivist for Research and Institutional Services. After eight (8) years of superior service as our Collections Manager, Lauren Kata took her career in new directions in March 2017. The open position is due to be filled in January 2018.

We are able to accomplish an ambitious set of intentional and unplanned projects because the regular curatorial staff can reliably depend on expert technical support from our consultants, part-time project archivists and interning students who add fresh knowledge and skills to our increasingly specialized professional duties. We are grateful to the following archives assistants: Jamila Davey, Keely Drummond, Amy FitzGerald, Rachael Gilg, Patrick Goetz, Delia Gray, Scott Jordan, Nikole Koelhert, Ellie Miller, Kate Orazem, Angela Perkins, Sarah Sauri, Win Scarlett, and Drew Schmitz.

This triennial reporting period was a particularly challenging one for the Archives Board as their authority was often challenged and their leadership potential stymied. In some sense this derives from a failure to appreciate the distinctly different kind of ministry that the Archives brings to The Episcopal Church. It is as much a cultural institution of the Church as it is an administrative arm and its value lies in its credibility as an independent source of historical interpretation and information management. As executive director of the Archives, this writer depends enormously on the Board's counsel in setting the mission and direction of the Archives. For the gifts of the Holy Spirit, which they and our other advisors embody, we are profoundly thankful.

*Mark J. Duffy*  
*Canonical Archivist*  
*December 15, 2017*