

BOARD OF THE ARCHIVES OF THE EPISCOPAL CHURCH

Membership

Ms. Pan Adams-McCaslin, <i>Convener</i>	Western North Carolina, IV	2021
Ms. Anne Bardol	Northwestern Pennsylvania, III	2021
The Rt. Rev. Jennifer Baskerville-Burrows	Indianapolis, V	2024
Dr. Heather Calloway	Indianapolis, V	2024
The Rt. Rev. R. William Franklin	Western New York, II	2021
Dr. Frederick Gerbracht	Long Island, II	2021
Prof. Lawrence Hitt, II	Colorado, VI	2024
The Rev. W. Keith McCoy	New Jersey, II	2024
The Rev. Dr. Robert Pace	The Episcopal Church in North Texas, VII	2021
Ms. Margaret Porter	New Hampshire, I	2024
The Rt. Rev. Samuel Rodman	North Carolina, IV	2021
The Rev. Dr. Brian Kurt Wilbert	Ohio, V	2021
The Most Rev. Michael Curry, <i>Ex Officio</i>	North Carolina, IV	
Mr. Mark Duffy, <i>Ex Officio</i>	Texas, VII	
The Rev. Gay Clark Jennings, <i>Ex Officio</i>	Ohio, V	

Changes in Membership

There were no changes in membership during the past triennium.

Representation at General Convention

The entire Board of the Archives were present at the 2018 General Convention meeting in Austin Texas as either deputies, alternate deputies or members of the House of Bishops.

Acknowledgements

The Rev. Canon Lang Lowrey, III; The Rev. Canon Michael Barlowe; The Rev. Deacon Geoffrey T. Smith

Mandate

Canon I.5.3

Sec. 3

a. There shall be a Board of the Archives which shall consist of the Archivist (ex officio, with vote) and twelve (12) appointed persons, three (3) of whom shall be Bishops, three (3) of whom shall be Clergy, and six (6) of whom shall be Lay Persons. All appointed Members of the Board shall serve terms beginning with the close of the General Convention at which their appointments are confirmed and ending with the close of the second regular Convention thereafter.

b. Members shall serve rotating terms for the purpose of continuity on the Board. In the first instance following the adoption of these provisions, one of the Bishops and one half of the Clerical and Lay Appointees shall have terms expiring after the next regular meeting of the General Convention as determined by lot.

c. Bishops shall be appointed by the Presiding Bishop, and other Clerical and all Lay Members shall be appointed by the President of the House of Deputies, all subject to the confirmation of General Convention. Consideration shall be given to assure that membership includes persons who possess knowledge either of history or archival administration, or are persons skilled in disciplines pertinent to the resolutions of the concerns of the Archives. Positions of Members of the Board which become vacant prior to the normal expiration of such Members' terms shall be filled by appointment by the Presiding Bishop or by the President of the House of Deputies, as appropriate. Such appointments shall be for the remaining unexpired portion of such Members' terms, and if a regular meeting of the General Convention intervenes, appointments for terms extending beyond such meeting shall be subject to confirmation of the General Convention. Because of the special skills and knowledge needed by this Board, a Member shall be eligible for appointment for two successive terms, after which the Member may not be reappointed prior to the next meeting of the General Convention following the meeting at the close of which the second successive term of the Member expired. Members appointed to fill vacancies in unexpired terms shall not thereby be disqualified from appointment to two full terms immediately thereafter.

d. The Board of the Archives shall have the duty to set policy for the Archives, to elect the Archivist of the Episcopal Church, and to set forth the terms and conditions with regard to the work of the Archivist.

e. The Board of the Archives shall meet annually, or more often as required.

f. The Board of the Archives shall elect its own officers and have the power to create committees necessary for the carrying on of its work.

g. The Board of the Archives shall adopt procedures consistent with the Constitution and Canons of the Episcopal Church for its organization and functioning.

h. The Board of the Archives shall report to the General Convention, and the Executive Council, through the office of the Executive Officer of the General Convention, and to the Church.

Sec. 4. There shall be an Archivist of the Episcopal Church whose duty shall be to manage the Archives, records, and related information resources of the Church at the direction of the Board.

Sec. 5. The expenses of the Archives of the Episcopal Church shall be shared by the General Convention and the Executive Council.

Summary of Work

A Narrative of Accomplishment

To close out the past with an accounting of where we have been, what we have learned, and where we are going—the future into which God is already calling us, we offer the following narrative history from 2018-2020 and indeed, as the enclosed time line shows, a bit of history before that.

The Board met seven times in the triennium: once in person, due to the COVID-19 pandemic, and six times by teleconference. The Executive Committee (comprising the three officers, Board member at large Larry Hitt, and the Archivist) conferred as a body of advice to the executive Director a total of 22 times in teleconference. Meetings leading to decisions were kept in minutes. The Chair communicated regularly with the Canonical Archivist to provide counsel, coordinated his annual performance review, and assisted in weighing priorities in light of the many demands of securing a new facility for the Archives and maintaining operations.

In the months following General Convention of 2018, the Board and DFMS management agreed that it would be in the best interest of The Episcopal Church and the Archives to sell the property known as Block 87 in downtown Austin, which had proven to be a low-risk, high-return investment in a prominent location in the hope that the entire archival holdings could be gathered under one roof. In early December of that year, the Canonical Archivist, supported by the Executive Committee of the Board, sent the Presiding Bishop a status report and action plan with recommendation for next steps

in locating the archives beyond Block 87. On December 31st the Office of Public Affairs released a statement on the sale of the Austin property which declared “Proceeds from sale to accelerate new Archives.”

In a January 2019 response, the Presiding Bishop indicated the need for a pause: “This transaction is a positive development broadening the church’s opportunities and creating new possibilities for addressing the archival needs of the church.” The moment for reflection was accompanied by a request that the Board pause its work and prepare a vision statement of its mission and ministry of the Archives with general specifications for a future archive. The Archivist and Board were informed of an unprecedented judgment that all previous actions of the General Convention and the Executive Council regarding a new archives building were effectively null and void.

It bears noting for the record that the sale of Block 87, after all debt, taxes, and development costs related specifically to Block 87 were paid off , realized for the DFMS a cash gain of approximately \$23 million from an investment that required no cash outlay or collateralized loan costs to the Society. The administration ceased all planning activities, including the capital fund raising effort, which was shelved amidst a leadership change in the 815 development unit. Proceeds of the sale were placed in Executive Council discretionary trust funds without reference to either their source in a designated asset for the Archives, or reference to the original intention of the past Councils.

When the Board met in Austin in February 2019, it endeavored to answer the question posed by the Presiding Bishop: “What are the physical and digital archival, and information management, needs of the Church in the early years of 21st century that the Episcopal Archives must address?” What follows is the statement crafted by the Board after its three-day February 2019 meeting, revised in the months which followed, and presented to the Executive Council’s Governance and Operations Standing Committee in June 2019 in video conference.

Archives Board’s Vision and Priorities for the Episcopal Church’s Archives

May 29, 2019

Keeping Archives, Keeping Faith

“Pay attention, my people, to my instruction! Listen to the words I speak! I will sing a song that imparts wisdom; I will make insightful observations about the past. What we have heard and learned that which our ancestors have told us - we will not hide from their descendants. We will tell the next generation about the Lord’s praiseworthy acts, about his strength and the amazing things he has done.” (Psalm 78:1-4 New English Trans.

Introduction

In response to a request by Presiding Bishop Curry and President Jennings, the Board of Archives at its recent meeting in Austin discussed at length the value and future needs of The Archives of the Episcopal Church. The Board devoted its full meeting in February to the topic of keeping archives – physically and digitally, and bringing new members into a conversation that has been underway for well over a decade. Members reviewed the journey and the lessons, the ideals and the compromises generated by a project of this magnitude, and broke into sub-groups to study what we identified as the priority concerns. Our task was not to dive into the vast details already examined to produce another list of specific requirements. We tried to think large of our shared mission. This report is the product of the groups' thinking refined into a succinct statement of need.

We focused our thoughts around three important areas: the theology of historical stewardship of archives, the practical needs and priorities, and a means of communicating these needs to the Church. The Board felt a certain level of urgency in giving advantage to the commendable outcome realized by the sale of block 87 in Austin. The concept we all aimed for in 2009 fell short of the ideal, but it brought the Church a gift of funds that opens new opportunities, which though modest in comparison, can still achieve the Project's essential goals.

The Archives of the Episcopal Church contains collections of both written and digital records of the story of the Episcopal Church. These records are fundamental to our identity and are a key to determining our future mission, particularly as we enlarge the rich narrative of the Episcopal Church beyond the self-imposed boundaries of the majority culture. Mission requires that we know the story of the voices that have been left out. The Board is excited that at this moment of invigorated mission the Archives can be equipped to respond more fully to the call of the Jesus Movement to become a beloved community. A space that supports various modes of accessibility will give all members a connection to the Church's story and allows us to more honestly address issues of racial healing, evangelism and creation care.

A Theological Understanding

Our Episcopal Church is a denomination which locates itself around the centrality of the printed word. Our historical records are part of a revered account of God's acting within our branch of the Body of Christ. At the same time, the Body of Christ is also a flawed human institution that carries its past into every occasion. Just as Moses urged the ancient Hebrew people to choose to remember their past lest they forget, Episcopalians need the records of our history to be safely preserved for access so that they may guide us as we continue to adapt to new ways to serve and know God, and with new insights.

The Gospel states that “The Word dwelt among us.” Our Anglican heritage has always been dedicated to making the Word accessible to the whole people of God: the Bible in the language of the people, the liturgy in the language of the people. When we are discussing the idea of the “Word” dwelling within the annals of the Church’s archives, the Board contemplates the value of having the collections safeguarded, catalogued, digitalized, exhibited, and cared for.

Archives as a Place for Evangelism and Mission

Board members are keenly aware that the Archives, in its mission support role, must venture forward strategically to communicate a message that feeds the healing work of the Church. The Archives reminds us that this work is a constant and renewable source to refresh our Episcopal DNA. Each year the Archives responds to close to a thousand inquires of historical, legal and general consultations, most of which are researched for a wider conversation. General Convention alone accounts for 534 inquiries, but adult study, student projects, parish anniversaries, and academic histories are all part of the conversation about The Episcopal Church’s real world engagement. The Archives’ Digital Archives and Web exhibits, which focus on the history of marginalized communities, reach over 200,000 unique users annually. The work of the Archives is the work of evangelism, which is the main work of the Church. The Archives work is the collaborative work of staff, primary resources, donors, users, and technologies.

It requires not just a storage solution but a ministry-centered design.

Over the last 20 years, visioning and planning for a future home for the Archives and its many collections has been a primary focus for the Board, the Executive Council, and General Convention. Currently housed on the 2nd floor of the library of the Seminary of the Southwest in Austin, Texas, with five off-site storage sites, the Archives has greatly outgrown its space. Over the last several triennia, numerous committees of Executive Council have reviewed the unique value of the Archives for the future not only in the collections held by the Church, but the opportunities for internal Church research, education, and a place to have affordable, reasonable access to the records, both physically and digitally. Why does the Board find urgency in locating the Archives?

- The space we rent from the Seminary is over 60 years old. They have requested the space be vacated for seminary expansion.
- The building does not meet archival, environmental, and industry storage standards, affecting the stability of the materials and their preservation.
- Every staff member’s office and most work areas are double-purposed.

- Current research space accommodates only 2 visiting researchers at a time.
- Collections and documents are held in five other storage facilities, requiring expensive retrieval fees and wait times.

Priorities in Meeting Strategic Needs

What are the strategic and practical needs for The Archives of the Episcopal Church?

- A well-designed, safe facility for the collections and the staff.
- A site providing appropriate environmental controls, fire suppression, ADA compliance, structural integrity, and workplace efficiency in a location not prone to natural disaster.
- Research and visitor accommodation with public display areas.
- A state-of-the-art facility that meets the archival needs for advanced information technology, digital archiving, and networking, with the capacity to accommodate changing technology
- Site selection that will be attractive in hiring and retaining quality staff. Aspects of this element include housing affordability and proximity to a college or university with a library or archival training program capable of being a contributing environment for work/study, part-time, and full-time staffing needs and staff professional development.
- Appropriate work space for staff, including standard archival processes of acquisition, lab and bench work, appraisal, organization, digitization, preservation, and special project implementations
- A site that is identifiable as The Archives of the Episcopal Church, which provides a welcoming, hospitable place for visitors/researchers with proximity to a commercial airport or public transportation to maximize access to the entire church.

Setting Direction Anew: What are the next steps?

The sale of the land in Austin and the realization of approximately \$20 million in new money is cause for celebration and a happy accomplishment after immense efforts expended by the Archives Board and the Executive Council. We have learned much about the range of possibilities by utilizing staff, consultants, architects, and other experts.

Executive Council and General Convention have continued to commit to the Archives Project and its importance during the last twenty years. Monies were set aside for the projected multiple moves to a new site and for endowment fund development to maintain an archival environment. These are

necessary expenses that, together with the building, give us reason to examine carefully the scale and program of the future Archives. The Board of the Archives believes that attention to these practical and urgent needs of the Archives at this time in the life of the Church will faithfully make the story of God's deeds known to our descendants "so that the next generations, children yet to be born, might know about them." (Psalm 78:5B-6a)

The Board of the Archives submits its recommendation to the Executive Council that it charge the Board, the staff, and other leadership of the church to undertake this important opportunity to work together to pursue an expedited development of the Archives while being attentive to the concerns of future sustainability, stewardship of resources, and mission priorities of the Church.

Background: The Archives of the Episcopal Church – Timeline

Over the past 184 years, the Domestic and Foreign Missionary Society (DFMS) has consistently affirmed and demonstrated a commitment to collecting, preserving, and communicating its history—by church canon, Executive Council action, and triennial budgets of General Convention. The Episcopal Church has long envisioned a suitable permanent repository for its ever-growing archive of material—manuscript, print, digital, photographic, video, and film. With each passing year and every acquisition, the need for a more accessible, spacious, staff- and user-friendly facility becomes more evident and urgent.

1835 The Episcopal Church signifies the importance of preserving its history by naming a conservator of archives.

1930 General Convention archives deposited at the New York Historical Society.

1940 Church Historical Society places additional archives at the Philadelphia Divinity School.

1959 Archive collections are combined and delivered to the Seminary of the Southwest, Austin, Texas, an archivist is employed, and a professional program of archives acquisition, processing, and reference service develops.

1985 General Convention enacts Canon I.5.3, establishing an oversight board for the Archives, further committing the Church to the care of its institutional history.

1996 The Archives Board requests a program assessment study for a modern archival facility.

2006 Expanded holdings are housed in four separate locations. Executive Council acts on Board's request to move forward with proposal. A Building Committee begins a three-year intensive study to determine optimal Archives site and location options.

2009 DFMS/Executive Council purchases Austin Block 87 property for \$9.5 million after identifying over 16 potential sites and 4 finalist locations, with intent to construct a suitable repository for the Archives in their entirety.

2015 Executive Council gives permission to sell Block 87, at that time valued at \$17 million.

2016 Executive Council renews support for the building project, allocating a reserve budget of \$3.3 million for moving and development. Archives project is designated as a priority. Development Office and Archives re-frames case statement and campaign materials.

2017 A developer is chosen for Block 87 property development, to include space for the Archives and an adjoining mixed-use project. Archivist and DFMS Development Director begin early silent fundraising, and initial major ask is pitched.

2018 In the Blue Book report to the General Convention at the conclusion of the Triennium, the Canonical Archivist states in 2017, “We expect to find fruition in 2018 with the start of construction on a new and permanent facility for the Archives.” Block 87 increased value has provided 18% year over year ROI. DFMS Development Director retires. On 31 December, TEC announces the sale of Block 87 in its entirety, resulting in cash profit in excess of \$20 million after all expenses, taxes and settlement costs.

2019 February 7-9, the Board of the Archives of TEC, the Canonical Archivist, DFMS executive staff, and Archives staff gather in Austin for a three day visioning process, with evaluation of current and future preservation, storage, and accessibility needs, for presentation at Executive Council’s June meeting.

[End of June statement to Council]

Working with Contingency

Although the June 2019 report from the Board of Archives to the Executive Council was well received, communication about the future of the Archives relocation to the Canonical Archivist and the Board was minimal between June and December 2019. Very preliminary conversations of other possibilities were underway among DFMS management and these would require time to explore. At the Board’s meeting on January 16, 2020, DFMS Chief Operating Officer Geoff Smith described his initiative to reach out to contacts at Iron Mountain, a records warehousing company, in order to arrange interviews with the Archivist for an assessment of a possible “turn-key” contingency for the

Archives. The Canonical Archivist and the Board voiced objection and concern about this type of contingency planning and sought clarification of this nonstandard option for operating a historical archives.

Following the Board meeting, COO Smith asked Board vice-chair Bishop William Franklin, Board member Ted Gerbracht, and Treasurer Kurt Barnes to meet on March 3rd to discuss the Archives building project. The parties agreed to recognize that (1) the Archives project had been supported by successive Executive Councils as a priority of The Episcopal Church and that the Board's recent vision statement serves as the operative document for any alternative to future housing for the archives; and (2) the complexity of the canonical oversight of the Archives and Archivist was acknowledged. Throughout the triennium, these issues continue to be addressed for the impact they have on trust in the relationship among Archives staff, the Leadership Team, and the Archives Board.

At the turn of the page from the calendar year 2019 to 2020 no one was aware of the impact which the COVID-19 coronavirus, racial unrest, and a vitriolic election cycle were about to unleash, in a way that we would soon exhort us to "live and move and have our being." The Board's Executive Committee learned in the summer of 2020 that COO Smith had presented a proposal from Iron Mountain to an Executive Council committee in June for consideration. A July 9 response from Executive Council's Executive Committee to COO Smith requested that a broader search be made for competing options. While the resolution did not call for their participation, the Canonical Archivist diligently responded to assist COO Smith in identifying reasonable alternatives and, working with finance and property consultant Lang Lowrey, to identify archival options other than an outsourced storage solution.

The relocation contingency received heightened urgency by the firm confirmation in late July that the Seminary of the Southwest was on target with its renovations plans and requested that the DFMS relocate the Archives by May 2021. Due to the immediacy of the interim move, the Archives staff would almost immediately need to begin closing down projects in progress and packing up the holdings at the Seminary. The Board's September 2020 meeting was laden with questions about the rationale for a temporary move of the entire collection, the full accounting of the funds obtained as a result of the Archives project at Block 87, the paucity of communication and collaboration between the DFMS leadership team, the Board and the Archivist. Trust became a central issue between the Board and the DFMS leadership, prompting Board member Bishop Jennifer Baskerville-Burrows to propose a resolution to Executive Council. While commending the continued search for a permanent site for the Archives, it advised that "discussions related to the interim and permanent housing for the Archives involve members of the Board of Archives and the Canonical Archivist; and. . .that any

conversations with potential partners from concept to completion include the Chair of the Board of Archives.”

Smith led a presentation of the ad hoc working group’s findings to the October 2020 Council meeting with Board Chair Pan Adams-McCaslin, Canonical Archivist Mark Duffy, and Consultant Lang Lowrey. Four options were ranked from the cheaper commercial storage company’s proposal, to a warehouse facility in need of renovation, to an attractive modified but smaller space, and finally to a large lease to purchase space that would require a robust and whole hearted staff response to accomplish. The Archivist’s lead recommendation was the latter site for its investment value, longer term suitability at a time of uncertainty, and least risky for its agility of future choice. The Executive Council chose renovation of the warehouse option for its short-term cost advantages. As of this writing, the archivists are preparing to close the Archives and begin the task of preparing the Seminary library holdings for an accelerated move to a site on Denson Drive in Austin from their last temporary home of 60 years at the Seminary’s library building. While the holdings will still be split across locations, the hope is that they will be less so with an improved floor plan.

Conclusion

This three-year report reflects a period of intense Board activity to match a series of decisions, actions, and sometimes opaque negotiations surrounding the future of the Church’s archives. It began with what was clearly a financial accomplishment unmatched in the DFMS’s history: the sale of the downtown Austin property. The property had been held as an income-generating investment for 10 years in the earnest expectation of either a building for the archives on the site, or a windfall profit for the DFMS that would be more than sufficient to complete the Archives Project. It was our hope that these monies would also be used for endowment purposes to feed and care for a new Archives thereby lessening the impact on the General Convention’s budget. This remains the collective hope of the current Board.

Yet at the end of the reporting period of the triennium, the Fall of 2020, The Executive Council has endorsed a move for the Archives to a renovated warehouse in what is expected to be a five-year interim stay as the DFMS leadership pursues alternate plans for a future home of the archival holdings.

The future home and the continuing mission and ministry of the Archives of the Episcopal Church also remains the collective hope of the current Board.

The membership of the Board of Archives, appointed by Church leadership, is comprised of historians, archivists, and other professionals who have brought their gifts, experience, and

appreciation for history and for our Church Archives to this work. Our ministry, in the words of a song written by Anne and John Barbour, is to be “Guardians of Time.” We join with the Canonical Archivist and his staff who are also “guardians of time” in the evolving story of the Episcopal branch of the Jesus movement. The Board offers their sincere appreciation to the Canonical Archivist and the entire curatorial and professional staff for their dedication in a time of great upheaval and uncertainty. Many of them had other employment choices offered to them but have stayed committed to the work of the Archives. We shared with them the expressed hope that this important decision about the Archives’ care and protection would eventually filter through a fresh constancy and understanding of the historical record’s importance—symbolically and evidentially—to the Church’s institutional future.

In his attached report, Canonical Archivist Mark Duffy will continue the thread begun at the beginning of this report—where we need to go in the frontiers of e-archives, greater online access to our past, electronic document deposit and exchange with diocesan leaders and protection of corporate historical data in a time of heightened concern with security and privacy. The Board acknowledges that the primary work of the Archives must be allowed to thrive without unnecessary hindrance, if the Church is to realize the benefits only recently accrued since the General Convention took direct responsibility for its archives and history in 1985.

The Rev. Dr. Brian K. Wilbert

Secretary of the Board

Submitted on behalf of the Board of the Archives of the Episcopal Church

REPORT OF THE CANONICAL ARCHIVIST

The Archives has maintained a steady progress in its main areas of historical documentation, education for mission, and evangelism in the three-year period from 2018 to 2020. The historical project has proceeded against a background of an unpredictable and competing social discourse questioning the reliability of shared knowledge. Its analogous expression is found in the public and church-wide reckoning with individual story telling of personal journeys. The dynamic is thought provoking. Stories as personal experience have achieved an elevated authority capable of influencing the public narrative. They emerge to awaken in others the threads of shared value and empathy, even when the experience is unfamiliar or foreign. Story contrasts with history, which is acquired by the conveyance of the collective memory, however contested that may be at any moment. History exists as an external refereed truth that challenges us to reframe our personal story in ways that are anchored in the greater community experience.

Properly set aside and safeguarded, archives are the touchstone sources for the shared story. They supply lasting influence on the reframing rituals that living institutions practice in the course of reevaluation and affirmation. The idea was proposed at a Board meeting early in the triennium that the future of archives is uncharted and the “meaning of archives” has been altered in some fundamental way by technology. Technology has certainly expanded the possibilities of archiving and added a layer of complexity requiring greater expertise. The essential meaning of archives as enduring documentation has not changed, however, for the historians and archivists who work to preserve primary sources and reframe events for the benefit of institutions and society.

For the Church, technology has left many of our dioceses and parishes in a far more tenuous state of concern about having the tools and expertise to manage their electronic archives in networked and cloud-hosted computing environments. As a central agency of The Episcopal Church, the Archives has a duty to develop intra-Church information systems. The elements of that kind of support and of a thriving church archives are immutable: place (a building), tools (information and technology), and experience (professionalism). Care in cultivating these defining elements will safeguard our stories and history for whatever providential future lies ahead.

Research Services

Support of the General Convention bodies, the DFMS, dioceses and our official organizations remains the core of our research services as measured by time and output. The value of the internal organizational research appears to be highly appreciated as there is a steady flow of inquirers asking not simply for fact checking but also for the in-depth historical analysis and reporting, a service

developed only in the last dozen years. Like so many services that are reliably performed, what was new just a decade ago is now the norm.

For the three-year reporting cycle that covers the period 2018 to 2020, the archivists responded to a total of 1,820 research queries that involved intensive historical research of several hours or days to complete (about 25% of which were General Convention bodies). The Records Management office responded to 163 research inquiries for Episcopal Church Center staff, which concerned more current research. Consultations to dioceses, parishes, and agencies on archiving, digital records, retention, copyright, and similar matters accounted for 334 incoming questions. Overall then, the staff responded to 2,321 requests for assistance from the Church community in the three-year period.

Institutional Research. The greatest amount of staff time is assigned to priority research of internal governance, administration, legal, and mission program inquiries. Interim governance requests involve considerable original research, digitization, and personal consulting. Although they amount to just 25% of the requests, they account for about 75% of the time. Internal requests typically result in a formal Archives Research Report. Archivists prepared 58 historical research products for internal bodies in the three-year reporting period. These research reports do not include, however, the separate categories of on-going legal support in areas of clergy discipline, property, litigation, trust fund terms, and copyright, nor the 467 research reports prepared for the legislative committees and individual bishops and deputies leading up to the last General Convention.

The following partial list illustrates the range of administrative and mission-related topics researched in depth for internal programs and governance.

- Admission of the dioceses of Haiti, Puerto Rico, Venezuela, and Hawaii
- Advocacy by TEC for refugees, criminal justice, and Israel-Palestine justice
- Analysis and compilation of Church's insurance coverage
- Anti-racism efforts by the institutional governing bodies of The Episcopal Church
- Associational history of The Episcopal Church and the Boy Scouts of America
- Church Pension Fund and its historical relationship with General Convention
- Church-wide strategic planning efforts by The Episcopal Church
- Coalition 14's origins, members, and grant programs
- Committee on Social Criteria for socially responsible investment: origins and history
- Copyrights/service marks of The Episcopal Church: history and status
- Creation, requirements, and evolution of the office of Licensed Lay Evangelist
- Cuban property owned by the DFMS in Cuba at the time of the revolution
- Direct Ordination Efforts in The Episcopal Church
- The Episcopal Church's position and reactions to the U.S. Civil War

- Evil and social justice as theological problems in the Baptismal rite revisions of 1979
- Evolution of roles and compensation of the presiding officers of General Convention
- Freedom of religion and separation of church and state
- General Theological Seminary and its relationship to the General Convention/DFMS
- Influenza Pandemic of 1918 and a web microsite history
- Development and requirements of parochial and diocesan reports
- Relationship, autonomy, and financial covenants of the ECW and UTO Committee
- Review of Decade of Evangelism and previous evangelism campaigns and projects
- Slavery reparations and The Episcopal Church's response to the issue
- Socially Responsible Investing and the Church Pension Fund
- Task Force on Older Adult Ministries: background of the ministry to seniors
- Affiliation evidence of Emmanuel Parish, Geneva, to The Episcopal Church
- Primary sources for historical research on Asian American Episcopal history
- Translation service, practice, and policies of The Episcopal Church
- The United Nations and the history of support by The Episcopal Church
- White supremacy in TEC: primary sources for confronting instances and stories

By far the most extensive research and reporting task in the triennium was the report requested by 2018-A088 to recommend to the local church Guidelines for Policy on Amending Church Records for Name and Gender Changes. The report was vetted with affected communities and submitted to Executive Council, which approved the guidelines for distribution at its October 9-12, 2020 meeting.

Website Research. The Digital Archives (ranging from 35–45% of current web use) is the main vehicle for reaching the Archives' user community for education, advocacy on public issues, Church-wide policy, and governance. Advice on records and archives and historical resources accounted for 26-37% of the total use depending on the year of the triennial cycle. Unique visitors to the site also reflected the Churches triennial activity: 198,733 (2018); 124,872 (2019); and 132,385 (2020). Page requests averaged 662,728 over the three years. (688,446 628,471 671,267). Information provided below describes new resources offered on the episcopalarchives.org site.

External Research and Outreach. Most external research has been diverted to online sources. Archivists still provide research assistance and document delivery to a variety of students of church history when this can be done efficiently. This minimizes costs as on-site historical research makes extensive use of the holdings and includes lengthy occupancy of the Reading Room and dedicated attention of staff.

Among the external research use were writers of diocesan histories, and historians examining the history of the American Council for St. Luke's International Hospital, the Fund for the Diaconate, the

General Board of Examining Chaplains, Japanese missionary Mary Buchanan McGill, the introduction of trial liturgies in 1979, the development of global Christian networks, the Historical Society of the Episcopal Church, the Alaska Missionary Field, Prayer Book revision, Alaska missionary and physician Dr. Grafton Burke, Bishop James Theodore Holly and Haitian history, the Good Friday Offering, a documentary of the Philadelphia Eleven; the evolution of *El Libro de Oración Común*; a forthcoming book on social activism in the post-war Episcopal Church; Norman Binsted and wartime internment in Philippines; and religious influences during the Japanese American WWII interments.

The Archives hosted four exhibits for local events: an exhibit booth at General Convention, two separate exhibits on women's ministry, and an installation with the Seminary library on Jonathan Daniels. The latter exhibit was curated with the assistance of student intern Nobel Brigham from Episcopal Academy in Newtown Square, PA.

Digital Archives

In creating preservation copies of historical records, archivists try to meet the needs of institutional users, seekers in parishes and advocacy networks, and public users by selecting primary sources with the greatest continuing value in areas of governance, mission, and education. The curators are dedicated to high quality control when authenticating published records as the Digital Archives are used as trusted surrogates for the original records in formulating contemporary reinterpretations. Digital projects for the reporting period were delayed in 2020 by the closure due to the pandemic, but many projects were completed nonetheless as the list that follows attests.

As the Digital Archives expands in time, the Church audience has expectations of regular updates and expanded access to more online resources. Electronic conversion of original documents requires close preparation and periodic maintenance, especially if reliability and web persistence are valued. Technical complexity comes when data arrives in the Archives of obsolete software systems. In these cases, archivists must develop new technology platforms and refresh data to ensure future accessibility. During this triennium, the Archives fully maximized its staffing resources to manage an active digital presence. Unrestored staff reductions that occurred just as digital information systems became the norm in 2009 set a limit of sustainable activity for the Archives program. Meeting the demand for digital information will be a challenge, however, in the next two triennia without compromising the quality of these and other services.

Episcopal News Service. Archivists took steps to expand the popular Episcopal Press and News digital archive by incorporating 4,567 articles (23.4 GB) published from 2006 to 2011. Archivists moved data from stored obsolete files on a defunct ECC web content management system and placed that data into an open source searchable database. The news releases were checked for de-

duplication, repair of missing text, false links, and formatting issues. Unfortunately, the associated images, videos, and captions were ill-advisedly separated from the stories when the old ECC web-based system was abandoned in 2012. The Archives has prepared a script to reunite the images and videos with captions and credits, which will require close work to validate against the correct story. Other future work will harvest news releases for the years 2012 to 2019 from the current ECC web management system into the Digital Archives.

The Acts of Convention, 1973–2018. Additions were made to the Acts of Convention database in the past three years. The 2018 resolutions were added in late 2019 due to the extended publication delay of the official Journal minutes. During the novel coronavirus pandemic, the staff reclaimed several tasks from the shelf of future work to address missing citations, inconsistent text formatting, and retrospective topic indexing. Notably, archivists extended the Acts database back one session to 1973 from 1976.

Reports to General Convention from Official Bodies. Archivists completed data processing and publication of the 2018 interim body reports (the “Blue Book”) to the Digital Archives, adding 51 reports. This update extended the existing digital record, which begins in 1976 and runs through the current triennium. A new indexing scheme and interface that simplifies the topical search was developed and will be implemented on the website in early 2021.

Resolves of Council. The Resolves of Council digital archive has been updated in the triennium. Staff compiled and coded data for resolutions of 2017–2019. These were added to the database with descriptive titles and indexing. They are scheduled for posting on the website in January 2021. The curators used the pandemic-related remote work situation to review the existing database (1976–2019) to identify endorsed documents of Executive Council for inclusion at a future opportunity.

The Witness Magazine. The most exciting new initiative of the triennium for the Digital Archives platform is The Witness magazine, the news journal of record for social justice ministry and advocacy in the Episcopal Church. The Archives negotiated acquisition of the historical records along with the copyrights when the Church Publishing Company closed in 2009. By the end of 2020, the archivists had scanned to preservation standards a complete set of the issues, (2,849 issues of 50,018 pages) for 1917–2003. As with so many of the delayed applications during this time of the pandemic, uploading The Witness to the Archives website will be an early 2021 task that awaits design of a search interface.

Alaska Mission Photographic Preservation. The Archives completed a pilot project and follow-up digitization of its extensive photographic archive on the Alaska Mission. These images were used to

publicize information about the outposts and raise funds for churches, hospitals, schools, and other basic social infrastructure. The photos have high historical and anthropological value for their depiction of indigenous tribes, families, traditional domestic and work life, community infrastructure, industry, and transportation. The photo archive will be completed as a project in early 2021 and published shortly thereafter to the Archives website.

Jonathan Daniels Oral Histories / EDS Archives. This preservation project was completed in tandem with an exhibit at the Seminary of the Southwest. Archivists digitized a large collection of remembrances and eyewitness accounts of Daniels' life, short ministry, and murder in Lowndes County, Georgia. The archive holds 159 recordings (595 GB) of interviews conducted by Charles Eagle from 1985–2003.

The Spirit of Mission. The Archives digitized 25 volumes across date ranges of 1859–1938 of the Episcopal Church's premier mission news publication *The Spirit of Mission*. The volumes are the last of the issues still under copyright and include issues missing from existing online publications.

Women in Ministry: the Woman's Auxiliary. Working with a generous grant from the United Thank Offering, archivists began preservation digitization in 2020 of the Triennial Minutes of the Woman's Auxiliary, the Triennial Minutes of the Executive Board of the Woman's Auxiliary, Journals of the Diocesan chapters of the Woman's Auxiliary, and miscellaneous reports and publications. This is the first of three tranches of primary source material dating from 1880 that will be preserved and made available for wider access.

Acquisition and Preservation of Born Digital Records

This triennium marks a major point of accomplishment for the Archives in completing and implementing its Digital Repository system for acquiring digital data. Archivists began bringing electronic records into the repository after completing two years of data analysis, system configuration, standards development, and testing. The curators developed fresh appraisal and accessioning standards for evaluating new electronic records (i.e. "born digital") files.

In 2019, stored digitized data was systematically migrated from hard drives to the preservation environment with full metadata treatment, normalization, and audit control. Given the 35 TB of backlogged data, the process of careful intake and audit review has been slow. Approximately 10 TB of data were prepared for intake into the repository in 2020 just before the remote working situation of the pandemic, which interrupted the workflow. Archivists continued to ingest records remotely and have prepared the remaining 25 TB for intake by early 2021.

The Records Management Archivist and the Digital Archivist have been especially conscientious in keeping tight quality control over the development of the Digital Repository to prevent future confusion or data complexity. In conjunction with two software upgrades, the Archives moved the application to Arkivum’s dedicated cloud account, releasing it from dependency on the physical servers at our office location. The combination of the ECC IT ofce’s withholding of technology in December 2019 and the sudden threat of an unplanned removal from the Archives of data servers—and the historical records that reside on them—caused substantial delays and lost productivity. The work of the Archives in this area continues to follow the highest professional standards. The custodial duty is to protect the evidential and historical value of the records from unauthorized access or manipulation and to keep secure the systems that hold and manage the data.

General Convention Interim Body Database (Extranet). The Archives labored throughout the three-year period to obtain a clean capture of the 2009-2015 governance data from the proprietary content management application called the “Extranet” and place it in an open-source database. The Records Manager completed a detailed appraisal report of the Extranet database structure, function, and content for the years 2009–2015. Working with the Director, a retention schedule was completed and delivered to the General Convention Office in July 2020 with retention and deletion recommendations. Provisions were made for removing or sequestering sensitive personal identifying information. Public documents were identified for a future public access interface with the repository. This work is ongoing and hangs exclusively on decisions made by the GCO as they evolve systems of data management.

Episcopal Migration Ministries Database Acquisition. Archivists gave significant unanticipated attention in the triennium to securing the refugee data held jointly by a resettlement consortium but stored and managed by a Lutheran Church IT unit. Political realities surrounding US refugee policy prompted the Archives to move forward with capture of a security copy of the cloud-based database that holds vital information on families and individuals who arrived with little or no permanent documentation. The Archives prepared a database container to receive and secure the refugee data outside the contractor's cloud account. This work was much interrupted by the coronavirus pandemic in 2020, but at the time of this report, archivists and consultants had settled on acquiring a year-end archival snapshot of the data base in early 2021.

Records Management and Data Retention

Archivists supported the work of DFMS staff by responding to regular requests for assessment of current records, retention decisions, organization of computer files, and consultation to create good record keeping systems. The Records Manager conducted 1,044 office consults, records assessments, and other supporting information management with DFMS staff in the three-year

period. At least a third of these contacts in any year involve extended consultations, including orientations of new staff and hand-off interviews with those leaving employment. The individualized attention gives DFMS employees a greater awareness of their record-keeping responsibilities and a measurably greater commitment. The archivist regularly maintained current content for the online document resource (ERIC), including a special section related to the COVID-19 pandemic with policies, office procedures, and remote working guidelines.

Acquisitions and Access

Historical records acquisition for the period 2018 to 2020 amounted to approximately 775 cubic feet of analog and paper records and 5.2 TB of new digital data. The Archives ceased soliciting historical records from non-DFMS entities in 2020 in view of the uncertainties of the pandemic closing and the future of the Archives' building accommodations. The intake of paper records were unusually augmented by the acquisition of the Episcopal Divinity School archives in 2018. On the whole, however, the quantity of digital records continues to accelerate as the amount of analog records declines. This same trend is reflected in the records received by the Records Management Office at the headquarters between 2018-2020, which totaled 316 cubic feet of analog records and 5.2 TB. An additional 4 TB of stored legacy data were discovered and set apart for assessment. The amount of paper records has declined by 200% over the last six years, but the impact of COVID on financial record keeping in 2020 will greatly accelerate this transition to digital record keeping.

Between 2018 and 2020, archivists conducted archival appraisal, processing, and description that resulted in the creation of 19 formal descriptive finding aids, which represent 229 cubic feet of fully processed records. In addition, Archivists prepared scaled-down inventories that opened access to more than 535 cubic feet of archival records. The following is a partial list of fully processed (*) and minimally processed records that also largely reflect acquisitions of the past three years.

- Papers of William White, 1643, 1764-1855 and the White Family, 1807-1895, 12.5 cu. ft.*
- Records of the Philadelphia Divinity School of EDS Archives, 1862-1874, 24 cu. ft.*
- Records of the Episcopal Theological School of EDS Archives, 1867-1974, 40 cu. ft.*
- Records of the Churchman, Inc., 1876-1997, 10 cu. ft.
- Records of the Community of the Way of the Cross, 1893-1998, 11 cu. ft.
- Records and Personal Papers of Louis B. Runk, Church Advocate, 1894-1938, 4 cu. ft.*
- Records of Province VIII (Province of the Pacific), 1902-2012, 9.25 cu. ft.
- Personal Papers of Frederic Whitney Fitts, 1903-1943, 0.7 cu. ft.*
- Records of the Historical Society of the Episcopal Church (HSEC), 1910-1992, 20.6 cu. ft.
- Personal Papers of Massey H. Shepherd, 1913-1990, 39 cu. ft.*
- Personal Papers of Maurice Eldred Votaw, 1922-1949, 1976-1977, 1.0 cu. ft.*

- John Hines Biography Collection of John Shelby Spong, 1924–1990, 1.35 cu. ft./105 MB*
- Records of the DFMS Department of Christian Education, 1927–1982, 2 cu. ft.*
- Records of the Rural Workers Fellowship, 1927–2010, 1.5 cu. ft.*
- Personal Papers of Edward Nason West, 1930–1990, 24.5 cu.
- Personal Papers of Helen Brogden Turnbull, 1939–2000, 4 cu. ft.
- Episcopal Church News Publications, 1940–2009, 27 cu. ft.*
- Personal Papers of Walter C. Righter, 1941–2009, 1 cubic foot
- Records of the Division of Town and Country Work, 1943–1970, 1.75 cu. ft.*
- Personal Papers of Leonel Lake Mitchell, c. 1958–2012, 9 cu. ft.
- Personal Papers of Samuel McCray Garrett, 1965–1986, 1 cu. ft.
- Episcopal Diocesan Ecumenical Interreligious Officers, 1966–2011, 3 cu. ft.
- Records of the Think Tank/Metropolitan Planning, Diocese of California, 1967–1976, 1 cu. ft.
- Records of the National Altar Guild Association, 1967–2009, 2 cu. ft.
- Records of the Episcopal Church Building Fund, 1972–2007, 4 cu. ft.
- Records of Episcopal Renewal Ministries, 1973–2011, 3 cu. ft.
- Records of the Standing Commission on Church Music (James Litton), 1975–1984, 4 cu. ft.
- Records of the Assistant to the Presiding Bishop for Administration, 1978–2000, 7 cu. ft.
- Records of Seedlings Curriculum, 1978–2011, 3 cu. ft.
- Records of the Pacific Basin Conference, Conference Presentations, 1983, .5 cu. ft.*
- Records of Integrity, New York Chapter, 1986–2005, 2 cu. ft.
- Records of Episcopal Council/Partnership for Global Mission, 1989–2010, 1 cu. ft.
- Records of the Office of Pastoral Development, 1990–2005, 3 cu. ft.
- Records of the House of Bishops, Interim Meetings, 2001–2015, 2 cu. ft.
- Records of the General Board of Examining Chaplains (GBEC), 2005–2014, 5 cu. ft.
- Records of the Association of Anglican Musicians, 2005–2019, 2 cu. ft.
- United Thank Offering. Records of the President (Squires), 2014–2018, 1 cu. ft.
- Records of the Court of Review in the Case of J. Jon Bruno, 2018–2019, 5 cu. ft.

Access to Memory: Episcopal Archives Catalog

In preparation for adding records to an Archives Catalog, curators completed a two-stage project in 2020 to standardize and complete a large portion of our archival finding aids that will be the source for catalog entries. The Archives revisited 350 finding aids, some dating back to its move to Austin in the early 1960s and many that were very cursory in their description. All were audited and placed into electronic templates to conform to contemporary standards of archival description. Archivists created new descriptive finding aids for 130 record groups. These records will be used to populate the online catalog.

Design of the catalog system itself was completed by the end of 2020 utilizing the American standard for archival description known as DACS. The DACS standard was used to program settings in the Access to Memory (AtoM) Public Catalog software system. The staff made important customizations for data display that will enhance the user's ease in navigating the online catalog's search interface. Along with the AtoM system configuration and DACS data model, the archivists created and began using the new classification scheme that will associate collections together intellectually for the user. The scheme will reduce the costly practice of compiling artificial groupings of records physically simply for the purpose of describing and indexing them efficiently. Test records were created in the fall of 2020, and as of this report all systems are 'go' for deploying the first online catalog. Moving the archives and the continuing pandemic constraints will be hurdles for this necessary project in 2021, but the Director has made this a priority together with preparing the holdings for the next temporary site.

A Sustainable Building Project

A momentous wave of change and redirection occurred in the status of the Archives since the Canonical Archivist's last report to General Convention. The near certainty in our 2018 report that the Archives was on the verge of achieving the multi-decade goal of a permanent and adequate home for the Episcopal Church's archives appeared to collapse in a moment of institutional hesitation. By mid-2018, after repeated delays in the construction timetable, the Archivist, the Board, and the project consultant agreed that the prudent decision was to withdraw from the downtown Austin site and release the developer to seek their own favorable conditions for future construction.

Their recommendation to management and Executive Council was that the time had arrived to recognize the investment gain and pursue feasible second choice sites. Principal on the line of credit loan had been steadily reduced by revenue from the parking lot on the downtown site. Selling the land at its appreciated value would produce a handsome profit to more than cover the cost of a fine archives building on a good site and endow it with funds to release the Church budget of the building's ongoing costs.

The Executive Council decided in 2019 to stand back from previous commitments of fifteen years and to defer an archives building for another day. Funds from the sale of the Austin property were divided between short-term accounts and an undesignated trust fund without reference to the Church's archives. Conversations continue in other quarters that offer possibilities for a future solution. As a Church so deeply entwined with a theological commitment to the historical revelation of God's purpose in our corporate and individual lives, we find ourselves once again postponing to a time uncertain the most basic stewardship responsibility to the Church's institutional and cultural history.

The Seminary of the Southwest's expected date for campus construction was set for June 1, 2021, leading to the inevitable decision in October 2020 to relocate the archival holdings to temporary quarters by June 1, 2021. Executive Council, advised by the administration, selected a five-year interim warehouse lease in north Austin over other options that offered greater insurance against future contingencies and the impact of another move on the physical collections. Although the interim facility is not adequate as an archival facility, it accomplishes the best possible outcome for the limited funds made available by Executive Council. Accomplishing the move in short order, while maintaining safe physical distances, will require an awkward choreography at best. The professional staff have committed to safely transferring the historical records as is our duty to donors and friends of the Archives.

In a volatile world of global pandemic and related economic, social, and climatic realities, new surprises can easily flummox today's prospects and visions. One prays for all things to find their day and to deliver The Episcopal Church and its archives to a faithful and honorable outcome. After twenty-eight years of observing processes of General Convention and its remedy for avoiding troublesome matters, the writer is reminded of a desperate parliamentary procedure, the motion to postpone indefinitely. It is a subsidiary motion used to terminate a main motion without taking a direct vote that would commit to it. The hope remains that this is not the process we have inadvertently stumbled into for taking care of the difficult and inconvenient matter of the Church's historical archives and records.

Acknowledgments

The Archives curatorial and technical support team accomplished worked under difficult circumstances in this triennial period that challenged their morale and ability to perform with the passion and dedication of the past. Nonetheless, they responded with a high level of true collaboration (not to be lightly confused with cooperation) as we navigated internal setbacks, the new corona virus, and preparations for a move that was not settled upon until October 2020.

Special recognition goes to Administrative Deputy David Hales for unrelenting good spirits and careful oversight of the routines of operations and so many "other duties as assigned" that make him a jack of all the archival trades. The curatorial staff have excelled in meeting the challenge of electronic records archiving and preservation. Corrinne Collett has given one hundred and ten percent in developing the Digital Repository as Records Management Archivist in New York, and Whitney Hughes, the Digital Archivist, keeps numerous systems and the flow of digital data fresh, responsive, and accurate. Our research team is led by the seasoned and wise oversight of the Research Archivist Chris Paton. Our collections management portfolio in this triennium has been under the care of our newest member Trina Purcell. The part-time archivists, some credentialed and

some bringing skills from other fields of the humanities and technology have been nearly peerless in their adaptability and keen interest in achieving the best outcomes in their work for the Episcopal Archives: Katie Buonanno, Jamila Davey, Keely Drummond, Amy FitzGerald, Rachael Gilg, Patrick Goetz, Ellie Miller, Kate Orazem, and Sarah Sauri.

This reporting period was unparalleled in the demands it placed on the Chair, members of the Executive Committee, and the Archives Board. The Board itself was enormously fruitful in producing a new vision to lead the Church to whatever next steps await these valuable historical collections, and we give thanks for their talent and spirit. The Archives Board's authority was kept distant and in check with diminished opportunity to voice their gifts to inform and advise the whole Church. As a cultural institution, it is charged to monitor and communicate the historical mission of the Church. If there is any surface ambiguity in its design, it derives from its dual ministry as both an administrative and program arm of the General Convention and the Domestic and Foreign Missionary Society. The Board's value lies in its credibility as an independently minded and representative body of oversight. As executive director of the Archives, this writer owes great thanks to the Chair, Ms. Pan Adams-McCaslin, and the members of the Executive Committee and the entire Board for their wise, candid, and always loving counsel in safeguarding the direction of the Archives.

Mark J. Dufy
Canonical Archivist and Director
December 15, 2020