WHAT'S IN A COLLECTION:
CREATING AND PUBLISHING AN INVENTORY LIST

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KYLE ROBERTS: My name is Kyle Roberts, and I'm the Executive Director of the Congregational Library & Archives. Welcome to today's virtual workshop with the CLA's archivists, Zachary Bodnar and Billy McCarthy: "What's in a Collection? The Creation and Publication of an Inventory List."

To begin, I'd like to acknowledge that the Congregational Library & Archives resides in what is now known as Boston, which is the place of the Blue Hills, the homeland of the Massachusett people, whose relationships and connections with this land continue to this day and into the future.

For those of you joining us for the first time, the Congregational Library & Archives is an independent research library. Established in 1853, the CLA's mission is to foster a deeper understanding of the spiritual, intellectual, cultural, and civic dimensions of the Congregational story and its ongoing relevance in the 21st century.

We do this through free access to our research library of 225,000 books, pamphlets, periodicals, and manuscripts, and our digital archive, which has more than 100,000 images, many drawn from our New England's Hidden History project.

Throughout the year, we offer educational programs like this one and research fellowships for students, scholars, churches, and anyone interested in Congregationalism's influence on the American story. Please do check out our website to learn... learn about future events and other things that are going on.

Well, I've got to say, it's hard to believe that this is the second year of our Church Stewardship Initiative. The days are getting shorter. The weather is turning cooler... well, at least up here in New England. And we're firing up Zoom for another year of programing.

At the CLA, we are committed to supporting churches struggling to engage in effective records management. From reference requests to in-person feedback, the archivists at the Congregational Library have long recognized the desire among churches to better understand how to steward their church records, to really help maintain the memories and mission of their church community.

We also recognize the challenge of not knowing where to begin. Last season, we hosted three programs in this series, all of which can be found on the library's YouTube page.

Today's presentation comes from feedback that we received to those earlier... to the surveys that we sent out following those earlier programs.

Now, let me introduce two people, two gentlemen, who don't actually need any introduction if you've been following this series, but deserve it nonetheless.

Zachary Bodnar graduated with a Masters of Library and Information Science from Simmons University with a concentration in Archives Management in 2018. Prior to his work here at the CLA, Zachary worked at the Bellamy Faraday House and Garden Archive, the Vassar College Special Collections, the Harvard Law School Library, and the Harvard Botany Libraries. Zachary joined the CLA as an archives assistant in 2017, helping to prepare material for digitization through New England's Hidden Histories project. And in 2018, he took on the title of Archivist. His professional interests include metadata collection and management, digital archiving, audio visual preservation, and archives management.

Billy McCarthy graduated with a Masters of Library and Information Science at Simmons with a concentration in Archives Management. Billy started working at the CLA through a graduate internship and was hired full time in 2018 as an archivist. His work includes processing some of the oldest and most complex collections housed in the archives, and he also manages reference requests and serves as the archival collections manager. Some of his professional interests include increasing access, collection management, processing of complex materials, and facilitating research.

All right, well, that's enough from me. I'm gonna go ahead and invite Billy to come on up.

BILLY MCCARTHY: Okay. Well, thank you so much, Kyle.

I want to again welcome everyone to "What's in a Collection? The Creation and Publication of an Inventory List," a virtual workshop with myself, Billy McCarthy, and Zachary Bodnar. Today we're gonna go and talk about how to make and use inventories.

After today, you'll be able to take a collection of boxes and folders, similar to the ones that you see on our slide, and effectively find specific material through the use of inventories.

Okay. So, Kyle briefly touched on it, but I just want to quickly remind everyone that this is our fourth online virtual workshop, and that this and all recordings are available for free viewing on our YouTube page. Since we last spoke to all of you, a curated playlist has been created that brings all of our videos together in one location. For those of you that want to use the video, as well as all the other excellent content we are putting together, when you get to our page, look for the playlist option. And from there you will see the Church Stewardship Initiative.

So finally, before we dive into today's topic, just wanted to take a quick step back and thank all of you for your fantastic and enthusiastic feedback that we've been receiving on the Church Stewardship Initiative. With our one year anniversary, we just wanted to thank everyone, and especially for all of your very kind words. It really means a lot to us both that y'all have been receptive to the work that we are doing and using that work in your own locations. Zachary and I knew that there was an audience for this kind of information, but as I said, we've had our expectations blown away. Again, thank you so very much.

I'm gonna step out of the way, and we're gonna dive into the topic. So, Zachary, take us away.

ZACHARY BODNAR: All right. Thank you, Billy.

So for this section of today's presentation, I want to speak about the creation of an inventory and how creating an inventory can be an incredibly important step towards your church's stewardship goals.

Before I go much further, though, I do want to cover what the differences are between a finding aid and an inventory.

An inventory is simply an accounting of the physical contents of a collection. An inventory does not make any claims as to the organizational status of a collection. An inventory's purpose then, is primarily to know what it is that is in that collection physically.

The finding aid, on the other hand, does much more than simply list the contents of a collection. A finding aid provides descriptive context for the collection about its history, its provenance, and more importantly, a finding aid presents an intellectually organized version of an inventory that is characterized by hierarchies and organizational schemas.

In other words, one can't create a finding aid without first having complete organizational and intellectual control over a collection.

So, something I want to say now is that while a finding aid is definitely industry standard for archivists working in repositories with many unique collections, a finding aid, while useful, isn't necessary if your church's goal is simply stewardship. In other words, an inventory is sufficient to meet your stewardship goals. Finding aids are labor intensive and take a lot of specialized knowledge to pull off.

Our programs have been slowly working towards the organization of a collection with an eye towards the creation of finding aids. And our in-person workshop this summer was focused on thinking about and implementing organizational schemas.

However, as with many parts of this Church Stewardship Initiative, we want to first focus on what is sufficient in order to meet your church's goals of stewardship. And the inventory absolutely is a huge step towards reaching that goal.

Now, what exactly does an inventory provide you?

Well, put succinctly, it gives you control over the contents of your collection. Knowing what exactly is in your collection is such an important step. It lets you know what types of material are present within the collection, what types of materials may be missing or aren't present, and it allows you to keep track of the contents of the collection from now until whenever, basically.

An inventory isn't a static document. It is a document that can and will grow as you move forward with your stewardship programs. It will be added to when new items are discovered or when the church's administrator transfers new documents over to the archives committee. And if your church decides to create a fully organized collection with an accompanying finding aid in the future, the inventory will be immeasurably helpful for reaching that goal.

Now it's time for me to make what will initially feel like a little bit of a tangent, but once again, I do need to talk about the importance of labels. And this is because good labeling at nearly every level of organization, especially physical organization, is foundational to the creation and use of an inventory.

So start off with a quick definition thing. When I talk about containers, I am talking about a unit that contains sub-units. That's a very meta way of thinking about it. But, the prototypical example really for this unit versus subunits is a box being a unit, a container, that holds folders... the sub-unit of that container.

In a lot of places, like a repository like us at the CLA, a container and a box will basically be synonymous. Almost all of our archival materials are held within archival safe boxes of various types and shapes.

However, a container does not need to be a cardboard box. A container can also be a file cabinet, or even a single drawer in a file cabinet if you want to get more specific. It can be a safe, or a shelf on a bookshelf, or really anything that contains and holds together a subset of your collection is a container.

In short, every one of your containers should be labeled, too. The most important thing that needs to be on the label is the number assigned to that container: Box 1; File Cabinet 1; File Cabinet 2, Drawer 3. These are some example labels that you might create for your repository.

Other information that labels should contain is the name of the collection and the name of the repository. Admittedly, for churches that hold only a single collection... only a single collection of materials, this might feel like, and might in reality be a little bit of a repetitive work.

But in cases... in case there is ever a move of materials to a new office or a building, or any need to move whole boxes outside their designated location, these labels on the containers can help prevent a lot of confusion later down the line. It helps to ensure that the box is clearly identified as being a part of this collection and being a part of this repository.

For, in the cases, too, where churches... your current church is the result of a past merger or had a merger into the church, having separate collections for each of these predecessor churches can also be really helpful. So in those cases, it's doubly helpful to have labeled onto the container which collection that container belongs to.

These labels can be as simple as penciled in text on the outside of the cardboard box, to a piece of paper with... Shelf 1 printed on it taped to the side of a bookshelf, to a magnet label attached to a shelving unit or file cabinet. The important thing is to find a method of labeling that works for you within your situation and apply it to all of your containers.

It's also a little bit of added work, but I also suggest documenting your methods for labeling, so that if ever one of those magnet labels gets lost 20 years down the line, you or someone else down that line can still put together what that container is supposed to be labeled as. It's just a... helps to ensure that there's continuation of knowledge all throughout the lifecycle of a collection.

So for purposes of time, I don't want to linger too long on this particular niche case, but I know that in many churches, bound volumes of records or other types of bound pamphlet and book materials are not uncommonly placed on bookshelves, and that is a perfectly valid and useful way to store these types of bound materials. If the long-term plan... and if this is a situation at your church and the long-term plan is to keep these volumes on the bookshelf as they have been, then you can think of the shelf itself as a container too.

A container does not need to be a box or something that closes like a drawer, or a file cabinet, or a safe. It can be something that is open like a shelf. And once you start thinking about that shelf as a container in and of itself, just apply the same labeling criteria and guidelines that I described above, and you're already set to go for how to label Bookshelf 1, Shelf 1.

Folders, or whatever sub-unit it is that exists within your containers, also need to be labeled. Generally speaking, this really will almost always be folders. In many cases, things like VHS, and volumes, and artifacts can still be placed inside folders. So I just generally default to folder labels for these types of materials.

At the CLA, that's pretty much exactly what we do, is if we have a VHS, we'll put the VHS into a VHS safe plastic container type... or, not container... case. Put that case inside a folder, and then label the folder as we would everything else. And that'll cover about 95% of the materials you'll see in your collection.

If ever you do run into cases where you can't put something in a folder for whatever reason, find some other way to have a label associated with that item that could be like a sheet of paper stuffed into a volume or something akin to that.

Folder labels should, at minimum, contain three things. First, a title. Next, the date range. And finally, a numeric indicator for both the folder and the container the folder is within.

Everything written onto a folder should be written in pencil. Do not ever write on a folder using pen. And don't use sticker labels on folders, especially because over time those stickers will fall off, and then you have lost the label.

Titles should be short and broadly descriptive of the contents within the folder.

Even if you have a pile of unorganized loose materials and you're trying to put those into a folder for this part of the project, there's usually some broad descriptive description that can contain the majority of otherwise unorganized materials.

Some really broad labels that we kind of... we use at times: administrative records, correspondence, financial documents. Those are all really broad titles that can usually cover a large swath of types of unorganized papers.

And in truth, it happens with every collection, even those that we organize in our own archive. But you will eventually have what you have to just label miscellany. The Misc. folder is an inevitability. It's not as descriptive, but it is just... it is... Miscellany is a descriptive term, and is a perfectly valid title for a folder.

And while the long term goal may be to minimize the use of miscellany as a folder title, for the purposes of an inventory where you're just attempting to gain control over the physical materials and to know where those materials are, it is okay if you have to label some or even a good, decent chunk of materials as miscellany for now.

Dates should generally just be written as a date range from the earliest year present within a folder, to the latest year in the folder. Labeling dates by month or day is usually just not worth it. And archival best practice is to generally avoid, in... its... it entirely at the folder level. We just do dates: earliest to latest.

Sometimes you will have folders which contain items with no dates present. If you have an idea of when those materials might have been created, you can use circa dates like circa

1900, or circa 1910 to 1919, if you have an idea of when a decade, when something might have been created.

But if you have no ideas or your ideas are conjecture and a guess at best, undated is also a perfectly acceptable date range. Just write undated on the folder.

The box and folder label is the most important label as it is what is used to keep track of the physical location of folders.

The prototypical example here at the CLA is going to be box number, forward slash folder number or B number, forward slash F number. It... Box 5 / Folder 17. It's just a matter of finding a method that works for you to indicate both the container and the folder number on each of your folders within that container.

In summary, having control of your church's physical materials is vitally important to the mission of stewardship. In order to organize a collection, to create policies for that collection, and to thoughtfully grow that collection, you must first know what is in the collection.

And you must know where the materials in that collection are stored. This is what the inventory provides.

The focus on labels is to ensure that you not only know what is in the collection, but you know how to find anything that is in the collection.

This is the kind of control we're focused on today. Organization of materials within a box or within an individual folder within a box is not really super important at this time. And I'll show an example of what that might look like later on.

After an inventory is created, you can go back and do that organizational work, work that pushes you closer to having full intellectual control over a collection.

But that kind of control can only really happen after you gain full physical control of a collection.

All right. I've talked probably a little too much about why an inventory is important, and especially about how labels are vital for the creation of an inventory.

So let's actually talk a little bit about how you go about creating these inventories.

So what do you use to make an inventory?

Really here, we're pretty much gonna limit ourselves to two tried and true methods. The first is to use a word processor like Microsoft Word or Google Docs. And the second is to use a program... or a spreadsheet program like Microsoft Excel or Google Sheets.

Our recommendation might lean a bit towards Google Docs and Sheets, largely because both are free to use and are editable by multiple people at the same time, something that can be very useful, especially if you have multiple people working on the creation of an inventory at the same time.

Word and Excel are great programs, and they are familiar to many people, but they do have costs associated with them. So if you, or your organization, or church doesn't have access to one of those programs, Google Docs and Sheets, kind of just in our estimation, generally becomes the kind of, go-to secondary option. And while Microsoft has been moving towards cloud based shared documents, that too has a cost associated with it unlike Google Docs and Sheets.

We really wouldn't recommend using much of anything else, though, to create an inventory.

Generic word processors and spreadsheet programs are fine, especially if there's one that you are most comfortable with as an individual user and creator of an inventory. But anything beyond a word processor or spreadsheet program wouldn't... isn't something we would generally recommend.

Especially we would not recommend any programs that are designed specifically for libraries, archives, museums, or galleries. These are all highly specialized programs, which will be overkill for your needs and will require training to learn how to use effectively. And most likely they will have some costs involved. So at this stage in a program, we really just don't recommend even looking at these types of programs yet. And we may... probably never would recommend it.

So quickly, I want to go over the pros and cons of spreadsheet versus word processor inventories, and then I'm gonna actually show what some of these look like in action.

So first off, word processors.

Word processors are very easy to read. And they are very easy to use, and use to create an inventory. The barrier of entry for a word processor is pretty low as most people have at least some experience using one, even if it's just to write an email. That is, the programs used to write emails are in and of themselves word processor type programs.

Inventories created with word processors are going to be really easy to print out and when printed out, they're going to be really easy for someone to just open up, and look at, and be able to read what the inventory contains.

However, there are some downsides to the word processor inventories. They are going to be more difficult to customize if you want to do something that isn't on our template, or just want to do... or if you want to change up how you're recording data midway through a Word document, it's going to be a little bit harder to customize and edit.

And if ever you find a need to do a significant shift in folders, or between... or folders between boxes or anything that kind of changes the organizational structure of the physical collection in the future, or such as relabeling things, that is probably also going to end up being a little bit more work to do in a word processor.

So spreadsheet inventories also have their own pros and cons.

Spreadsheets are very easy to customize, edit, and change at pretty much any step in the process, even after a full inventory has been produced. This is because each subset of data is recorded in separate cells, so it is way easier to break down data and move it around in a spreadsheet: copy, paste it, change something for only one bit of data, but not the rest of that line's data. It's just a much more fluid system and much more easier to move stuff around.

Spreadsheets are probably easier to use for very large collections, and if you are familiar enough with spreadsheet programs like Excel, there are plenty of tools and automations that you can implement to make data input easier and/or to adjust data on the fly.

However, all that flexibility comes with the cost of added complexity to program that can make such programs more difficult to use, more intimidating to use. And unlike word processors, less people have pretty intense usage, or experience using spreadsheet programs.

Spreadsheets will also be more difficult to print out, and for an average user looking at a printout or even just at the document itself, it'll be a little bit more difficult to read than a word processor document.

All right. We've looked at some of the pros and cons, so let us drop the slides for a minute, and I can share my screen, and we can actually look at the two templates and two examples of how those templates are used. One each for a word processor and one for a spreadsheet.

So, looking at the word processor one first, the template is... the first page is basically all about information about your repository: the title of your collection; the address of where that collection is held, most likely your church building, but it could be an annex or some other building; phone and URL for the church just so that that information is down and someone looking at this can use it; repository location, basically write out the building, floor, room of where that repository is held; physical description, just sort of type out the number of containers.

Like for us, we would often type out 27 boxes, or 4 boxes, 2 flat files. That's kind of how we do it. Use whatever your container labeling system is, basically translate that to your physical description.

And then a primary and secondary contact. A primary contact should be absolutely necessary. The secondary contact, especially if you have an archives committee, that can be drawn from someone who is another member of the archives committee, or, and the primary contact can be like the church historian if you have one or whoever is the chair of the archives committee, just to help to make sure that there is at least always two people who know what the... about the inventory, how to use it, and about the various locations of the collection and details about the collection.

And then, basically one per page or however many pages it takes to do it, is just create an inventory, a page for each of your containers. So, container 1, right, It's a location out and then folder number, title of that container, and a date.

So if we want to see what this kind of looks like in action. So, I watched a little too much "Murder, She Wrote" growing up, so I created an example using the First Congregational Church of Cabot Cove from fictional Cabot Cove, Maine.

So this is kind of an example of what it would look like. You have your title of your example, address for the church email or URL for the church if it has a website, email would also be a good URL to include, phone number, repository location. This is a church that has an annex building. The history office is on the second floor, so that's... repository location is church annex, second floor, history office. This is a collection that's 27 boxes, but it also has two shelving units and a single filing cabinet. So that it goes over the whole of the physical description. And then our two contacts: the church historian and the secretary of the archives committee.

And then, I've only done one of these pages, but an inventory for Box 1 could look like this with the location, again church annex, second floor, history office. This box is stored on Shelving Unit 1, on Shelf 1.

I've also used this as an example of like, how the organization of these boxes, what is in them, doesn't... isn't truly necessary at this point. This is a box that contains church records, sewing circle account books, the 200th anniversary sermon, marriage records. It's kind of just a jumble of stuff that is in this box. But because you will have an inventory at the end of this project, you'll still be able to look at that inventory and say, okay, I know how to find the marriage records volume because I can look at this and go, okay, Box 1, Folder 9, I just need to grab that, and I can look at the marriage records.

So, moving on a little bit to the spreadsheet. The spreadsheet isn't going to be what I kind of call as pretty looking, but it is another good way to organize data. This... the way, unlike a

word processor where you have multiple pages and so you can organize information by page, spreadsheets will have multiple sheets in a single spreadsheet, or workbook is what I believe Excel calls the whole thing.

So we're gonna use a sheet in a workbook to basically describe every container. This first sheet is just the same exact information I showed in the word processor example. All of the information about your repository.

And then, Container 1, Container 2, Container 3, you can... you would rename these, then rename the sheet, and then input information on the location, and then presumably all of your folders would be in numeric order, but for some reason they weren't, you can change, like, folder number stuff: a folder number, folder title, and then folder dates. Again, kind of all of the same exact information. Just organize it in a different way in a different program.

Going to the example, Cabot Cove Church. Again, the same exact information, just filled out in a slightly different form here for the repository information sheet. Box 1, same exact information just organized in a slightly different way.

Box 2, I wanted to show that some of the usefulness of sheets being that they are much more highly customizable. So the main thing I did here with the sheets was like, okay, maybe you... you're being have a situation where you need to be really detailed about your collection and how individual items, the condition of individual items. Because maybe this was a collection that suffered water damage at some point in the past. So you need to be really mindful about the status and physical condition of your collection.

So Box 2 here is an example of something, for example, where that might be the case, and you've decided that start date and end date should be their own separate field, so you can more easily organize information later by simply the dates. And then having a notes field here, so, baptismal records, there's been significant water damage to them, unfortunately.

We are very happy today to say that we are sharing these basic templates and the accompanying examples with everyone here. For those who might be watching this program after the fact, you can either use the QR code shown here, or use the links that appear in this program's description to access the folder.

Thank you for your time, and I am now happy to turn it over to Billy, who can talk about how your church can use an inventory to provide access to your collections.

BILLY: Okay. So I'm gonna... now that the inventory, sort of explanation of creation is done, I'm gonna highlight a couple of things to keep in mind and maybe some audiences to share your completed inventory with. So, in particular, I want to highlight some additional steps for using, publicizing, and protecting your collections.

Even though the inventory has traced where all the records are and your labels will help everyone know what is in the folders, that does not mean your work is done. In fact, archives and records management are a continuing process for any open and functioning church.

So before anyone can start to use the archives, it's imperative that you assign either a single point person or set up an archives committee of a few select people. In previous workshops, we had suggested that the work of archiving start with a committee. So if you went this route, the same group can tackle this sort of work.

Whatever work you decide, a collection requires a steward.

And why is that important?

Well, that's because an inventory is focused on accessibility, but it doesn't cover security. It does not cover... protecting your collection from harm. And it does not let people know that your collections are available in some form and function.

Your inventory has made things extremely easy to find, but without proper control it can also be extremely easy for something to be missing... be taken or go missing.

So on the left here, I just added a couple of questions. We'll go through all of them now, but for your committee or point person to review later down the line, keep those five questions in mind. With those questions, like I said out there for you, let's talk about security and access.

All right. So first, we're gonna focus on security. I'm gonna use the SAA's dictionary definition, which sort of sticks in line with our last workshop, "Demystifying Archivist Speak."

Security is the measures taken to protect materials from unauthorized access, change, destruction, or other threats. Each of your churches likely has some sort of safe or maybe even a security deposit box where you store your important documents. Part of what you're doing is controlling who can access and use those documents.

Now, while you can't possibly put everything in your archives in a safe, you could, for instance, lock the door the archives are in and control who would have access to that key and thus access to the collections.

The image on the left is from our rare book room cage, and as it indicates, it's a secure location where only certain people will have access to it. Even amongst our own staff, not everyone has the key they need to get in. We also have cameras set up across the entire library stacks.

And I just want to say, I recognize that most of you simply just don't have the capabilities to set up anything close to what we have. But I would suggest that each of you take some time to identify ways that you could add even a minor amount of security measures.

Thankfully, one of the easiest ones these days is cameras. Basic security cameras have become extremely cheap and very easy to operate. Chances are you or someone you know already has a form of the Ring cameras, and they actually make ones that aren't just doorbell cameras, but just regular old cameras. Similarly, Amazon sells the Blink Mini, which is a camera that only costs $35. It's very easily installed and does everything through Wi-Fi.

I would suggest that point person or committee, you know, get together, review if those measures are working, and then also decide on further security measures as needed. If you're going the committee route, I'd suggest meeting at least once a month if possible. But again, that's based on your own situations.

Just keep in mind, at the end of the day, security measures only work when you're proactive, not reactive.

So I had those questions about access, and I want to to elaborate on a couple of points. So when I'm talking about access, I'm thinking about two categories in relation to your own churches: your staff and everybody else.

For staff, you may want to limit it to only the point person, the committee, and then the minister. But again, dependent on your own situation.

When it comes to those that are outside the staff, this could be the members of your own individual congregation, but also a variety of other interested stakeholders. Your committee should start out by determining if you're even gonna let people outside the staff have access, and if so, under what circumstances.

I do want to quickly acknowledge here that for that committee and point person, it might feel uncomfortable to think that anyone within your community could be capable of stealing or purposely hiding material. And I do want to fully understand and acknowledge that. That said, the job of this committee is to think about any possibility and to actively counteract them.

Often it's the ones we trust the most who can be the largest security risk. And so what I'm sort of getting at here is there are reasons why we have access restrictions.

I would caution all of you to never adopt any form of a wide-open policy, even for your own staff. The more people with access, the higher the risks.

Even here at the CLA, as the head of reader services, it's my job to foster a welcoming and opening environment for our visitors. I have to balance that with reality. I simply cannot allow free reign. When we have people in our reading room, they are supervised at all times and no one is left alone under any circumstance. We don't think everyone coming in is a thief, but we would be foolish to start from a place of complete trust.

Many of your collections have items that will have deep sentimental and emotional value to specific people.

And just as a note, we've been asked in the past if we would be willing to remove items from collections because it would "mean a lot to a particular family." We would never do this, and I recommend you do the same.

So, some simple questions. You know, I had those questions earlier, and they boil down to three simple ways: who, when, and how. As always, your own reality is gonna dictate what is feasibly possible. I'm just giving you my ideal recommendations.

For who, I would recommend that you have people ask for permission in writing to either your point person, your committee, or your minister in advance. This will give you a paper trail for everyone who has been granted access in the past.

In a worst case scenario where something has discovered to be missing, you can then go back through those permissions and then chart out a time frame and figure out what might have happened.

For when, completely dependent on what your church can feasibly accommodate. If it is possible, I would recommend a small, predetermined window when staff are on site or when someone on the committee can supervise individuals using the material.

Finally, how. Basically, what are your access policies? If any of you have done research in a library or archive in the past, you're gonna be familiar with the policies that I'm talking about.

And I'm just gonna quickly go over a few of them right now. So I'm just gonna point out right now, so we're a little short on time, is the things we don't allow: food and drink, pencils, pens, folders, and notebooks. All of those are simply to protect the material.

If you're unsure about which ones to be the most aggressive with, it's food and drink. One rogue water bottle will destroy everything. So please just be very careful, and do not allow any mixing of original material and food and drink.

I would highly recommend the point person or committee review the policies... our policies as well as other institutions, and adapt them to your own situation.

The last thing I want to touch on would be publicizing either that an inventory has been done or that the entire thing is available either on your website or a Facebook page if you have them. For some of you, you might not even want to do this, and I completely understand. That said, I would at least advocate you make it known that an inventory project had been done and that a final document exists.

Many of your churches have been around for some hundreds of years and maybe some for only a couple of decades. But all of you have one thing in common, and that's you have records that hold within them the memories, the history, and the lives of your community, and those that may have moved on to other communities. The wealth of information within those records have value to people and also to groups that you might not have thought of before.

For publicizing, the easiest way to do this would just be in your church newsletter or in your bulletin. That will make sure the closest stakeholders know what has been done, and many might be interested in seeing some of the records. And this is especially true if you have photographs. Everybody loves photographs.

Other places where you might want to include maybe an article would be like in your local newspaper, you can have a collaborative article or event with your local historical society.

And of course you could place something on your own website. If you have a website and you're willing to share your inventory, I would suggest adding some sort of tab or section called "Inventory of Church Records."

Getting the word out is a form of community building and bringing together groups that may not have otherwise connected with one another.

For potential stakeholders, these can have a very wide variety. The most clear ones are obviously your congregation, but also maybe members of your local town hall who are interested in church history. Members of neighboring towns and cities might recognize their own families within your records.

And then, of course, the big ones would be genealogists and historians. And sometimes in the past, we've had collaborations between churches and local area colleges.

It's just all about getting that information out there.

And with that, thank you so very much. I know we went through a lot today. As always, please reach out to us if we're not able to answer your questions today.

And with that, I'll turn it back over to Kyle.

KYLE: On your last slide. Billy, one question that came to mind is, after our friends out there make their inventories, would it be a good idea to send a copy of that to us here at the Congregational Library?

BILLY: Yes. Actually, I should have mentioned that. Absolutely.

We get a lot of questions that are basically surrounding genealogy, history, and I've directed dozens and dozens of people to individual churches. So if you know that you've completed your inventory, please send them to us directly.

We would love to have them so that we can facilitate the people looking for information and yourselves.

KYLE: Great. Thank you.

The first question here goes back to where you kind of started. And, for those folks who might not have had a chance to watch the earlier videos, when do you know it's time to make the inventory?

You know, do you... is that the, you know, the very first step when you get your committee together? Or at what point is it really the time to start making that inventory?

ZACHARY: A very good question. I would say it is an earlier step, than a later step.

Once the committee is set up, and once they, or the church historian is ready to, it's... the first steps are usually gather your materials, find a place to place all of them, get your... basically your repository set up.

I'm going to jump a little bit ahead and answer the question, what is the repository? Because I see that in the Q&A as well.

A repository is basically... is just a really fancy archives and library way of saying, the place that stores collections and records. So when I say your repository, I mean your church, presumably.

So the first steps are to set up your repository essentially, set up your church historian's office, or wherever it is you're gonna be storing your materials. Gathering those materials there. Gathering the people who are going to be helping you along that process. The next step after that really can be create that inventory.

That doesn't have to be the next step. Off the top of my head, I can't think of what other next steps would be. Perhaps next steps would be more towards what Billy is talking about. Create those policies in place first and then work on the inventory.

But really, in the next, one of the earliest steps you are gonna want to start taking is working towards an inventory, because that will be... no, my almost... no matter what your specific stewardship goals are going to be, having an inventory, having physical control over your collection is going to be one of the steps on your way to meeting your goals.

KYLE: So Carol Barrett asks, our minister wants to toss out all of the old historical files once the documents are scanned.

What is the best practice for records that are 70 years old?

And this is, a this is a question we get a lot. And I think, Billy, you probably have an answer right at the ready.

BILLY: Yes, I do.

So, we bring... I think we've actually said this every single time. And to make sure we always say it.

Digitization is not preservation. It is accessibility.

Carol, directly, you're welcome to email us. We'd be happy to help you out. Do not. Do not toss records that old. Do not toss records that are new.

If you digitize or scan items, you have not protected them.

I would remind anyone who has done research—microfilm. The amount of records we have lost to microfilm digitization in the sixties, seventies, and eighties is... unquantifiable.

Just because today we have scanning abilities that are much better than before, that does not mean the file formats are gonna survive. It does not mean the way we deal with technology is gonna be the same as today.

Do not throw out your original records just because you digitize them. I know that there are obviously space requirements and other sorts of things, but you... Overall it would just not be a good idea, and you are more likely than not going to lose that information forever.

Even think of CDs, DVDs, floppy disks. All of these were cutting edge technology that are now basically impossible to retrieve data from.

KYLE: So, save it, please.

And if you don't have space, you can always reach out to your local historical society, or us, or another place that might have the capability for holding it.

Great comment here from Bryan Breault saying, I learned the hard way: label the box, not the box top.

Any other, sort of, hints on labeling or anything that you… that either of you have seen of what not to do when you come into an archive, when it comes to labels?

ZACHARY: I just want to say I have also done the box top labeling at one point. And, yeah. It is, it is a lesson I think every archivist has learned at one point in their career.

I talked about it before, but I really strongly… recommend avoiding, in almost all cases, stickers as labels. Except for highly specialized stickers like the ones that we use here at the archives, which are like silver-backed, and acid free, and have a whole bunch of qualifiers on them that make them really expensive for what they are, most stickers, the adhesive on those stickers will degrade over the course of 30, 40, 50 years, and then those labels will be lost. And they will fall into a folder, or a box, or behind a shelf, and they will be lost.

And we see this all the time with collections, especially collections from the seventies… sixties, seventies, and eighties that come in to us that they didn't use stickers on their file cabinet folders. And in 70% of those cases, those stickers have fallen off and are now disassociated with whatever that folder was. And it just makes more work for us in the long term because we no longer have access to the original information associated with that folder.

That's kind of the big one that I have, really.

Other tips and tricks… consistency is really the only other one I have.

It doesn't… we set out, sort of, what we think is kind of a minimal guidelines. You can change those guidelines that… to see fit for your inventory and your project. What we provide are, kind of, just example templates, essentially.

But, just be consistent. Be consistent and document how you are being consistent, and future generations will very much appreciate any kind of documentation and consistency.

KYLE: I'm gonna jump around a little.

Another great question here from Cathy Chambers, wanting to know how you would recommend incorporating born digital or digitized records into an inventory.

So, is the… is an external hard drive a repository, maybe, or a container or….?

ZACHARY: The short answer is that yes, I would probably... I would almost probably, certainly... I'm not gonna use exactly because there are too many, with digital records there are too many variables to cover all cases.

But yes, something like a flash drive or an external hard drive would be better, or a CD or some kind of external storage like that would be a container. And I would treat it as such.

The... what gets tricky with files is that they are often files, within nested folders, that are nested in other folders, that are nested in one giant folder, that is beside another giant folder that contains a lot of just random stuff in it.

If you are using an external hard drive, I would say if it's possible to, instead of adding files to it immediately, create a file structure that matches, ideally, probably is going to match close to or exactly with what your, kind of like, church's office organizational structure is.

Like a... if there's an admin office, then admin office gets a folder. If there's a minister's office, minister's office gets a top-level folder. You follow that structure as best you can with your born digital materials. And just, sort of, document that we came to this structure via following our internal organizational structure. And, and then use that to then add the information that is necessary to the inventory.

What you might end up having to do is create almost a sub-inventory for your inventory for born digital materials because... if your external hard drive is very complex in its organizational structure inside of it, you might need to just go ahead and kind of just create a sub-inventory.

Why I said digital gets really complex really fast, just because of how many variables can be involved in digital.

KYLE: That's great, but I think your answer gives a really good start for, sort of, thinking about where...

Leanne Marden asks, our church committee working group is developing an inventory. Great work, glad to hear that. We've encountered an assortment of documents that don't appear to be relevant. What process do you recommend for considering disposition?

So it almost sounds like weeding. Should we... should you do the inventory, and then do the weeding? Or do the weeding with the inventory, or...? And then, when you've got your pile of things, to weed, then what do you do?

ZACHARY: I would do the inventory first.

If it's possible, I would make a note of folders or boxes that have materials that are... should be flagged for weeding, during the inventory process, if that's possible.

And then after the inventory is complete, because at that point you'll have a better understanding of the whole collection and its whole scope. At that point, then as a committee, meet, determine what your collecting policy is going to be.

What are the materials that this... that your... that the collection contains? What are the materials/types that the collection does not contain, and then use that policy that you have created as a committee to then go through your inventory and say, okay, we did flag these things for weeding.

We've now created this policy to say explicitly what it is that we keep and don't keep. Do these materials still look like they're... they need be weeded, in which case, then, you pull them out, you go through a process of approval and then say, okay, these are no longer a part of our permanent collection.

KYLE: Excellent.

And maybe creating that collection policy is gonna be a future program for the Church Stewardship Initiative. There we go. All right.

So, a great follow up question from Lindsay Miller about external hard drives and digital files.

She said that in her church's work, they've been told to have three ways to preserve digital files. Is that overkill, or is that, you know, if you have digital files, you know, should they be... should there not just be one hard drive, but also Dropbox, too, or something like that? What's your advice?

ZACHARY: Yes. The advice to have multiple backups and backups of your backups is in fact pretty much accurate.

And at the professional level, at the archival level, that is absolutely what should be happening.

Yes, there is a copy that should be on like an internal server, on a computer, or internally.

There's keeping geographically separate copies, which in modern times is usually having some copy also existing on the cloud somewhere, which I've also talked about how I don't like clouds, but at the same time in the archives world, we are kind of beholden to the existence of clouds that are owned by corporations that do not necessarily have our best interests in mind. But also we have no alternatives. So we're kind of a little bit screwed in that case, but we kind of have to trust them that they continue wanting to make money that way.

And then, yes, having an external backup hard drive, that's also a copy of what's on your internal drives, that is also consistently backed up on a schedule to continuously match with what is on the cloud and internally.

And yeah as I said, digital gets really complex really fast and there's a lot of backups built into proper digital preservation that make for a lot of institutions, especially ones that don't have a lot of manpower, that make it difficult to follow through on the necessary steps required in order to properly professionally preserve digital materials, because all of the devices that they are stored on are all devices that are prone to just stop working after a period of time.

KYLE: Well, the questions keep coming in.

As just a final one... and I want everyone to know out there that we save all the questions, and we pass them on to Billy and Zack, and they can follow up with you directly.

You know, as a final thing, there's a lot of questions here about fire safety. And, you know, for a church that might have, you know, you know, let's say 10 or 20 feet worth of material, what's the best way to safely store records, especially if you might be in an old church that might get struck by lightning or, you know, God forbid.

What is your feeling on, sort of, fire safety for collections?

BILLY: So, it kind of depends.

Unfortunately, even if you get something that's fireproof, we had an instance of a church where it was fireproof, but it wasn't resistant to water. So they were able to stop fire, but it got waterlogged, and it was equally as damaged.

The more protection you can give, the better.

There are some fireproof-ish cabinets. They do get very expensive. I saw something about bank vaults and safety deposit boxes, also extremely expensive.

What I would suggest for the smaller churches is identify the most important items that you have and deal with those first. So, you know, your deeds for your... the land, the buildings, anything that is incredibly important... acts of incorporation. Gather the most important things together and then spend the maximum you can on those.

At the end of the day, there really isn't a way to fully protect yourself from natural disasters, I would highly suggest... it's called the Northeast Document Conservation Center. They are, as they say, a northeast institution. But they have a myriad of free and paid knowledge, guides... they do a lot of relief for hurricanes and floods.

Use their resources. There are so many places that are working actively to try and help situations just like yours. But unfortunately there is no perfect solution.

We've talked about it in the past. Even we can't give you... We can't protect everything 110%. Neither can Harvard. Neither can Yale. It is just not possible.

So by being as proactive as humanly possible, you can mitigate problems, but unfortunately you can never get rid of them.

KYLE: Great.

So, thanks everyone. Thanks, Bill and Zack... Billy and Zack. We will see you all soon.