

FINDING AN ARCHIVAL HOME: UNDERSTANDING THE ACCESSIONING PROCESS

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KYLE ROBERTS: My name is Kyle Roberts. I am the Executive Director of the Congregational Library & Archives, and welcome to "Finding an Archival Home: Understanding the Accessioning Process."

To begin, I want to acknowledge that the Congregational Library & Archives resides in what is now known as Boston, which is in the Place of the Blue Hills, the homeland of the Massachusetts people whose relationships and connections with the land continue to this day and well 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, CLA's mission is to foster a deeper understanding of the Congregational story and its ongoing relevance to contemporary society. 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 130,000 images, many drawn from our New England's Hidden Histories project.

Throughout the year, we offer educational programs and research fellowships for students, scholars, churches, really anyone interested in Congregationalism's influence on the American story. I hope you'll check out our website, congregationallibrary.org, to learn more about what we do and for news of forthcoming events.

Here 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 of the Congregational Library have long recognized the desire among churches to better understand how to steward their church records and maintain the memories and mission of their church community.

We also recognize the challenges of not knowing where to begin. And it was from that point that we have now created nine different programs in our Church Stewardship Initiative webinar series, all of which can be found on the initiative's webpage. So please visit us at congregationallibrary.org/csi to see and learn more about those programs. And so without further ado, let me introduce our speakers.

Billy McCarthy graduated with a Master's of Library and Information Science, MLIS, at Simmons University with a concentration in Archival Management. He started working at the CLA through a graduate internship and was hired full-time as an archivist in 2018. Billy is

Head of Reader Services, helping the CLA's visitors with reference requests and facilitating in-person research. Billy also serves as the collection manager for the archives, working with the CLA's offsite vendor to protect and maintain the organization's archival records. Some of his professional interests include increasing access, collection management, processing of complex materials, and facilitating research.

And starting off today is Zachary Bodnar, who also graduated with a Master's of Library and Information Science from Simmons with a concentration in Archives Management in 2018. Now prior to his work 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. Zack rejoined the CLA as an Archives Assistant in 2017, helping to prepare materials for digitization through the New England's Hidden Histories project. In 2018, he took on the title of Archivist. His professional interests include metadata collection and management, digital archiving, audiovisual preservation, and archives management.

ZACHARY BODNAR: And thank you, Kyle, and good day to everyone who's turned in to today's program, "Finding an Archival Home: Understanding the Accessioning Process."

We are so excited to have you all here today. Today we'll be peeling the curtain back on an archival process that's probably not really well understood, while also talking directly about what you might expect if ever you do go the route of working with a repository to donate records or personal papers.

Today's program is a part of the CLA's Church Stewardship Initiative. This initiative includes webinars and workshops all focused on helping churches develop their records and archives programs. We strongly believe that church communities are uniquely positioned to best preserve the memories of their communities and keep the mission of their church accessible for future generations. And we hope that our series of webinars and workshops help these communities tackle the sometimes Sisyphean task of records management. The Church Stewardship Program celebrates its three-year anniversary this month, and you can expect many, many more webinars and other CSI-related programming in the coming years.

For those who are interested, every one of our past webinars is available to view at your leisure on the CLA's YouTube page. There's a handy playlist that includes all of our past programs in chronological order, and we hope that as you think about the stewardship of your church's records, that you can go back and listen to these past programs. We also suggest looking at the CSI portion of our library's website, which links to all of these videos while also providing transcripts of the programs and quick links to many resources which we have mentioned or made over the past three years.

In today's program, we're gonna be diving deeply into the process of donating records, looking at both sides of the donor repository relationship. Individuals and organizations both work with repositories of all kinds to donate historic records: papers, objects, and art. In this

part on setting expectations, we'll be talking about how repositories, through their initial conversations, set expectations with donors of materials. While the donation process is often not particularly complex or stressful itself, the circumstances that lead to discussions of donations certainly can be. So a lot of work is done early on to set expectations for donors.

Something to make clear right away is that every repository is different. Every repository has its own collecting policies, its own rules regarding donations, and its own limitations on how it can operate. As a result, we'll be talking in fairly generalized terms today.

That said, one thing that you can expect is that every repository... is that once the suggestion of a donation has come up, the repository will both communicate with you and work with you. to make the process of a donation as smooth as possible for both the donor and the repository. Almost every repository has constraints around the size of collections that they collect. For one, space is expensive and limited, and repositories must make collecting decisions with that in mind. They cannot take everything because they simply do not have the space to be able to take everything.

Similarly, the larger a collection is, the more time it will take to process it. Most archives only have a limited amount of staff time to devote towards processing. There is a reason basically every archive has an ongoing backlog. All of this is a preamble to say that the size of the collection does matter. Archives need to know early on how large a collection is so that they can plan for the space needed to store it and the time needed to process it. So you should expect that the size of the collection will come up early and often in the first conversations you have with a repository.

Repositories may work with the donor to figure out how best to measure the collection size. It may also work with the donor to cut down on the size, though I'll speak more of that in a bit. I've alluded to it already, but time is a resource most repositories are lacking in. As such, are likely to be competing demands between the schedule of the donor and the schedule of the repository. Most repositories will likely try to work with the donor's schedule, but sometimes that isn't always possible. So you may come to a repository with an ideal timeline in mind for the donation, but do not be surprised if you find yourself needing to compromise somewhat.

One thing I will say, though, you should always reach out to potential repositories long before a hard deadline, such as the sale of a building or the closure of your church, that requires moving archival records immediately. If you reach out to a repository as you are rapidly approaching those deadlines, there unfortunately is no guarantee that the repository will be able to take your collection based off of the deadlines. It's both a courtesy to the repository and to your collections, really to reach out as soon as possible if you know that you'll be needing to donate your records or papers in the future.

Every repository has their own unique collecting policies, which affect what materials a repository can collect and cannot collect. These collecting policies are the policies at heart of

any and every collecting decision an archive makes. Whether printed, published, presented, or discussed, you can expect that every repository will discuss with you their collecting policies and how they relate to your donation.

Going back to the size of collections, repositories will typically work with donors to remove materials from collections that do not belong at the repository long before the donation arrives. It's pretty normal for repositories in their early discussions with donors to work to refine the donation so that it better fits within the collecting scope of the repository.

Collecting scopes can cover both the content of material as well as the physical nature of the materials. For example, for the content of materials here at the CLA, we state that we do not collect certain types of financial records. An example of physical nature, we also state we do not collect three-dimensional artifacts and artworks.

Tangentially related to collecting scopes, sometimes when a donor hears that a repository doesn't want everything in a collection, the donor may attempt to move those rejected portions of the collection to a different repository. Generally speaking, as a field, we archivists discourage the splitting of archival collections. Having collections at multiple repositories ultimately decreases access to the collection, because people must either visit or work with two different repositories to see the whole story of that collection. Most archivists and repositories in general will generally suggest that donors work with only one archive, rather than trying to split materials across multiple places.

There is often a long time between when a donor reaches out to a repository and when the physical materials are actually physically transferred to the repository. That time delay is due to many factors, from schedules to just the physical realities of our world. While it's obviously not important for repositories to know the daily going-ons, there is some expectation that donors will keep repositories updated on any major events that ultimately affect the timeline that has been hopefully previously set by both the donors and repositories for expectations on when a collection should arrive.

Speaking of when collections arrive, one question that is never truly easy to answer is how materials are to be physically transferred to the repository. Decisions on delivery are often made with each individual donor, rather than a straight-up policy. For donors who are far away from the repository, sending materials in the mail is a very, very common delivery method. For donors who are closer, they might deliver the materials themselves, or the repository might visit the donor to take the materials. Many repositories will ask the donor to take on any expenses related to the donation themselves, the big example being postage costs. However, it's not uncommon to ask repositories if they can shoulder some of the costs. They might have some portion in their budget set aside for costs associated with acquisitions. There's no guarantee here though, and again, every repository is very different on specifically this portion.

Rarely, if ever, repositories... will expect some type of financial donation to go alongside the physical donation of materials. The pay-to-play model doesn't fit most repositories' missions to ensure that important records are preserved and made accessible. That model also flies in the face of repositories who wish to ensure that all voices are present within the archival record.

All of that said, if you are reaching out to a repository to donate records, then don't be surprised if the repository's development team reaches out to you in turn. Most repositories are non-profit organizations that rely on financial contributions to not only stay afloat and provide access to materials, but to provide programming and other value-add services around those collections. A repository's development team can show potential donors how a financial contribution might specifically benefit the repository. They will also often personally work with donors, both big and small, to find a way to contribute that is both meaningful and within one's means.

And that covers my top section on expectations, so I turn it over to Billy to talk about gift agreements.

BILLY MCCARTHY: Alright. Thank you, Zachary. So now that we've taken a bit of time to discuss expectations around accessions, I just wanted to take a minute or two to further explain gift agreements.

So the CLA's gift agreements, they transfer, convey, and assign all rights of materials from the donor to the CLA. These agreements allow archives like us to have the legal backing to make the changes needed to a collection for long-term use and long-term preservation. Every institution will have different agreements with slightly different language, but the point of them all will be to, as I said, transfer ownership from a church or a person to an institution.

We have two slightly different agreements, one that is used for a mix of physical and digital records, and then one that is used strictly for digital-only collections. I did not want to put the legal jargon in here as a distraction, so I'm just gonna quickly highlight a couple of things on both.

For our physical records gift agreement, It will include a top-level list of the materials present, written out by the donor; gives the CLA or any institution the right to rearrange, re-house, or re-describe the material not considered appropriate for our collection; and noting that donated material will be made available to all of our visitors with restrictions as need be.

In our digital-only gift agreement, the CLA can publish and make available files across all web platforms such as social media, our website, and our digital archive. The digital agreement also asks the donors to indicate any potentially sensitive information such as social security numbers or medical records or things of that sort; wholly transfers intellectual property rights

to the CLA; and gives full permission to create records, transcriptions, and metadata alongside the copyright for all of them.

As I just mentioned, our standard gift agreement helps the CLA have the legal backing needed to house and properly care for a collection. I will note, in very rare circumstances, mostly surrounding our digitization program, New England's Hidden Histories, we have in the past taken material on loan. The archives, at this time, does not consider loans a viable option for most situations, because without that legal backing of ownership, it is best for us to leave material on loan basically untouched, even if we know that they need additional care and preservation.

Different places, as Zack alluded to at the start, are gonna treat loans just like gift agreements, just like everything we're talking about today, differently. As of this recording, the CLA does not take on new collections via loan, minus the NEHH use case I described. I will note that if you're someone here who has material here already on loan, we're not talking about you, this is just about the future. I also want to say, if your church does end up working with any kind of institution to donate its records, please do not complete that process without asking for and reviewing their gift agreement before any physical transferring of material.

Like anything else in life, you want to review documents before signing them. And thankfully, these agreements are not going to be the same length as the various terms of service that we all skim over in this digital age. We do not currently keep our gift agreements on our website, but I'm gonna add a link to the University of Michigan's website that includes their gift agreements. If you want to see one that's very similar. And I'll add that in in a moment.

And now I'm gonna turn it over to Zack to get into the weeds on copyright. Take it away, Zack.

ZACHARY: Hello, and yes, what is copyright? Thanks, Billy. So we've talked about gift agreements and the legal transfer of physical materials to a repository. Don't drink every time I say repository today. I'm so sorry.

Next, we'll tackle the topic of copyright and copyright holders. Copyright is an inherently complex set of laws. You can thank both a certain cartoon mouse and the US' export of culture as a form of soft power for the insane complexities of copyright law, both domestic and international. But to keep things moving then, I'll be keeping this section fairly short and scant on specific details. After all, mostly we are interested in how copyright and the transfer of copyright interacts with the donation and accessions process.

So what is copyright?

Briefly stated, copyright is a type of intellectual property right that protects original works of authorship. I don't really want to get into too much more detail than that baseline definition. It

gets real complex real fast, and I'm not a copyright lawyer. What's important to note is that all original works are, or were, protected by copyright, and that the original part of original works is defined.

If you're interested in more in-depth knowledge on the topic, I strongly suggest looking at the US Copyright Office's website. A lot of the information I'm stating here was pulled almost directly from their very useful primer on copyright.

Once an original work is created and fixed, meaning it exists in some tangible way and not just solely in your head, then the creator of that work gains copyright over that work. Organizations can similarly hold copyright, and they very likely hold the copyright of works created within the scope of their employees' or members' functions. In other words, the CLA very likely holds the copyright to this very webinar that we are presenting right now.

A common misconception about copyright is that you need to register a work with the Copyright Office in order to own copyright. This is inaccurate. Copyright is automatic. You do not need to register anything to hold copyright over your own original works. Copyright registration provides additional rights and protections, so it is very useful for publishers and other industries. It's why the Copyright Office exists. However, the basic rights afforded by copyright law do apply automatically to any and all original works being created right at this very moment.

So what are those basic rights? Well, most deal with the reproduction and distribution of original works and any derivative works. Basically, as a copyright holder, you have protections against unauthorized use, distribution, or reproduction of your works. You also have the right to provide authorization for such things, and also the right to transfer your own copyright to another individual or organization.

At its most basic form, the gift agreement only transfers physical ownership of materials from one to another. Copyright is not transferred unless explicitly stated to be transferred. Many gift agreement forms may have a section about copyright, or a donor can transfer some or all of their copyright if they desire. But not all gift agreements have this section. When working with repositories, we do generally recommend you reach out to ask about copyright and how the repository handles the transfer of copyright, if at all.

Copyright being as complex as it can be, is actually usually not super complex when it comes to records and papers being transferred to the archive, mostly because the copyright holder is usually fairly unambiguous.

However, if your church has ever done an oral history, or wants to do an oral history, things start to get instantly way more complex. The main reason is both the interviewer and the interviewee have claims of copyright over oral history interviews. For this reason, the best practice is to have signed releases with interviewees that clearly denote who holds copyright.

If at all possible, older oral histories where the interviewers and the interviewees are still available, it is possible to go back and retroactively sign these kinds of release forms. So if that's an option, it's... for an oral history you have done, it's one I do suggest going back and doing again.

When it comes to donating oral histories, their usefulness to the repository may depend wholly on the repository's ability to understand the oral history's copyright status. As such, it is always best to deposit releases or any other sort of legal documents surrounding oral histories, if you have them, alongside the oral histories that you have deposited at an organization.

While repositories might want to hold copyright, for various reasons, mostly stemming from the ability to make materials accessible, it often isn't actually necessary, hence why also many archives do not include copyright as part of their gift agreements. But the main reason it isn't necessary for libraries and archives to hold copyright over the materials they hold and preserve is, here in the US, the Fair Use Doctrine. Under copyright law, repositories may provide access to physical materials to researchers, regardless of who owns the copyright.

Further, under fair use, researchers may publish limited portions of an item, even if it is currently under copyright. Basically, think quoting from sources in a paper. Anything more than that though, does require copyright permissions, and usually it is up to the researcher, not the repository, to figure out those copyright permissions.

As you can see from the standard use policy found in almost all of our finding aids and pictured here, the CLA very explicitly makes it so that it is the responsibility of the researcher to find and ask for copyright permissions.

Alrighty, so that's about all I've got on copyright. If you have any questions, I'm happy to answer during the Q&A section. But before that, I've got to turn it over to Billy to talk about the accessioning process here at the CLA.

BILLY: Okay, thank you, Zack, for that great discussion on copyright and other legal issues.

As Zack was saying, our final topic for today will be to look at the accession process itself as it works here at the CLA. Like with everything we've kind of said so far today, this is just our side of things, and other institutions will have different ways of doing things. Some will be the same, some might look radically different.

I'm gonna try and pick up around when the time a collection has arrived at the CLA, either via postage or hand delivered. While the transfer process is ongoing, Zack or I will begin preparing space for the material, either in our offices or in our library stacks.

In general, the CLA measures the size of a collection in terms of banker boxes, as they are the most common type that we encounter. A banker's box is also equivalent to what we would call a standard Hollinger record carton, which is just the company name that we buy our boxes from. And I would refer to a banker's box being about the dimensions of 10 by 12 by 15, but there'll be slight differences there.

Where the collection is housed will rely on several factors, including the size of the collection, our current storage restrictions, the status of our backlog, and the overall bandwidth of the archival staff at the time. I will note that the CLA does rely on an offsite storage company, and there will be times when we make the determination that a collection will be sent offsite after the various steps of accessioning are complete. The place that we use specializes in archives like us, and they provide the exact same optimal temperature and security that we have here on site.

At this stage, we can move on. With space allocated and the collection safely with us here at the CLA, we are almost done with the kind of transfer process section. The final step is to get the gift agreement signed by both the donor and the CLA. We will keep, we will scan, and send the finalized gift agreement to the donor for their own records, and keep two copies for ourselves: one physical version and one digital version.

For the most part, we really do want those gift agreements signed and done before we move on with any other process. And at least in the last few years, we've been very good about that. But we do ask that, even once the collection is dropped off, don't forget to sign the agreement.

When a collection does arrive, we will often do a very quick overview of the material and check to ensure the current containers are serviceable and not in danger of damaging the materials within. Even if we don't need new boxes, we're also quickly looking over the material to determine if there are any immediate or pressing concerns. Top among those concerns at this point would be any signs of active molds, as that does require the complete quarantine of the affected materials and immediate return to the donor or, in the worst case scenario, the destruction of said material.

So... I'm now gonna start, I'm gonna move on to the steps that we would take once a new collection has fully arrived in the library, gift agreement signed, and all of that. This on the screen here is what we call a collection assessment form. I have only added a small snippet of the first page of this collection assessment plan, of which we have seven pages in total. I purposely chose to not go over all of these sections, since it's frankly way more information than you need. But I thought it was at least valuable for everyone to get a sense of the work that is going into this process.

Six, seven of these pages has different details that need to be laid out. The new collection assessment is a vital component of the post-arrival workflow as it allows for the accessioning

archivist to put to physical paper important initial documentation for the collection. This documentation later becomes the basis upon which the archivist engaged in the processing work will begin their actual work itself.

Broadly, the collection assessment form is trying to answer two very important questions. The first question being, what is the physical status of the collection? The accessioning archivist uses the assessment to describe the physical condition of the collection; determine if there are any preservation concerns within the collection; determine if the collection will require the purchase of specialized storage material, such as custom oversized boxes or potential storage for audiovisual material; and finally, record somewhere the size of the collection.

The second question we're trying to answer is what is the plan for processing the collection? The accession archivist uses this assessment to make initial intellectual determinations about the collection, provide some information regarding the administration and scope of the collection, and create an initial plan for how the collection might be processed down the line. Having these completed sheets makes the work of the eventual processing archivist much easier, since it helps situate themselves as to what they should be expecting to see in the collection.

We may find that the processing plan needs to be amended or needs to be wholesale sent away once the actual collection work is done. And that is a-okay. In fact, it probably happens more than it doesn't. The idea is just to leave something available for the next person when they pick it back up. So the collection assessment is only one step in this much larger accession checklist or sort of different tasks.

Here at the CLA, we use a software some of you might have heard before called Trello to track our new collections and to keep track of how much of the accession and processing process is complete. On the screen is our current checklist, which has grown over the years, which consists now of 15 different tasks. Once all 15 of those are checked off, we would consider the collection to be accessioned. Like the collection assessment plan, I don't really want to bog down the conversation by going in-depth with every single 15, to all 15 of the tasks, we'd be here for far too long, but I do want to highlight just a couple of things. You'll actually see on the list that the collection assessment plan and the completion of the gift agreement, which we've already discussed, are each one of those 15 tasks.

One of the largest sections of remaining tasks includes the various documentation we use to properly track our collection and their status. Here at the CLA, we juggle several different potential accessions at various different stages. So all of these different documentations is our way of making sure that everything is up to date and that everyone on staff can be on the same page. It is not uncommon for us to have upwards of a dozen different potential accessions going on at once, which is one of the many reasons we ask churches, as Zack alluded to earlier, to not think of a library and archive the week the building is sold, but instead as a continued partnership that is formed many, many years in advance.

A somewhat newer addition to the workflow has been incorporating the CLA's excellent communication program, led by my fellow staff member, Lauren Hibbert, via social media posts. The goal is to make people aware of new collections once they arrive because new accessions are very rarely, if ever at all, also slated for processing immediately upon arrival. So, by having these posts on Facebook, Twitter, and others means that something is out there if people are searching for rare records from a particular church or a minister may have ended up. Sometimes we'll go just a slight little extra mile and have a larger post inside one of our e-newsletters. So I really encourage everyone here to make sure that they are signed up for those monthly newsletters to learn, not only about new collections here at the CLA, but all of the other excellent programs that we are doing.

Moving on, I want to talk about a step in the process where the accessioning archivist starts creating some records. The accession record, it's an electronic record stored within a program that we use here called ArchivesSpace, and we use those to create our finding aids. If you've ever looked at our finding aids online, you can tell right away which ones are ArchivesSpace generated because their gigantic logo is right on the front page. Its primary function is to record the basic information about the collection, the donor, and the temporary location of the materials, be it onsite or offsite.

That accession record is also an important part of the CLA's efforts to properly track and record collections throughout our entire workflows. The accession record, excuse me, in combination with the assessment, helps to ensure that even in a worst-case scenario where there is a disruption in staff continuity, any future staff member can find the collection, understand the collection's origins, and collect a snapshot of what the processing plan of the collection might be.

For those of you joining us as archivists, either for an individual church or an institution like ours, I'm gonna go out on a limb and guarantee that you would probably benefit from having more information from previous people in your posts, and we sort of put this all together as a result of the same thing with us.

So after that, we take the information from this accession record, and we create what we call a stub record in our public cataloging system called Liberty. On the screen is an example of one of those stub records, and those of you that have searched through our catalog have probably come across one of these at some point. We create these stub records as just a way to show that the collection exists at the CLA, but is not fully processed to the point of having a completed finding aid. We introduced this step as part of the workflow a couple of years ago, and now we very much see it as very much a vital part of the accession process.

The abstract, which is at the bottom, provides a basic overview of what's in the collection, what we call the scope and contents sometimes. And that's actually a step in the collection assessment sheet that I didn't show you that we were discussing earlier. And we more or less port that over to the stub record verbatim.

In order to create as many interlocking points of access and discovery as possible, this part of the workflow also requires creating and gathering documentation, both physical and digital, and storing that documentation in proper locations. We more or less refer to these documents as our "collection folders," and includes a digital version stored on our servers and a physical filing cabinet inside our office, which is gonna be located directly left out of frame when Zack comes back up in a few minutes.

In both locations in those collection folders, we will keep gift agreements, communications between archivist and donor, inventories if one was created before a collection was donated, and anything else that we want to make sure is available for the future. All the tasks share the same goal again of properly documenting the acquisition and pre-processed status of the collection to create this kind of paper trail or memory bank for the collection itself.

So again, this was a bit brief, but I did think that it was good for us to kind of go over some of these tasks just so that you can get a sense and see this kind of slight peek behind the curtain of the pretty in-depth work that institutions like us do to receive collections.

Sometimes I think there might be this under... this false understanding that it's: collection arrives and the next day collection is available. And while I certainly wish that were the case, every institution from shore to shore has a backlog that is very, very long. But yeah, I hope this... you found that helpful.

The CLA, I will say, having been here along with Zack for a really long time, we've come a really long way in the last couple of years to update and refine our internal and external processes for accessioning new collections. I will give a very warm shout out to Zachary for taking the lead in crafting this new documentation and to everyone we have worked with in finding collections a new home, be it here with us or a more local institution in your areas. While we cannot hope to be the place for every church's material, we hope that you are now a bit more informed about the work that we all do, and that goes into preserving the material of your churches.

So, to quickly conclude, I thought it would just be fun to show everyone an example of how one church collection arrived at the CLA a few years ago. I think this had the most varied kinds of boxes, from chips to diapers. On the right is just an example of a new box formed out of material on the left, because while those are nice enough boxes for transfer, they're not where we want them to stay for the long term. The collection went through all of the steps I just laid out today and now awaits its turn in our processing queue.

So thank you so much for listening to today, and I'm gonna turn it back over to Kyle to start the Q&A session.

KYLE: Thanks so much.

So we've got a good 15 minutes for questions, and I want to kind of start off with another part of the early process, which I don't think you touched on as much but might be worth naming.

Here in New England, we got a lot of 400-year-old and a lot of 350-year-old churches. And sometimes these churches will have given their collections, part of their collections, a hundred years ago, or 75 years ago, or 50 years ago to an archive. I know, Billy and Zack, you have both encountered this in working with churches. You want to talk a little bit about, is that... Are there steps that can be taken to understand if part of the collection is already someplace else? Are there any tools or tricks to kind of understand where things might have ended up?

BILLY: I can jump in. So, if you're a church that knows it went somewhere but doesn't know where, for that angle of things, I would recommend trying to find meeting minutes, or notes, or anything from around-ish or sort of when you think that transfer might have taken place.

Also, for those of you in probably smaller towns, just reach out to the Historical Society and ask. Actually, I'm working with a church right now where they recently figured out that some missing volumes are in the historical society. And they only knew that because someone on the board worked at the historical society. So on that angle, I would say reach out and ask your local partners.

And then if you know where it went and you want to know more about the process, I've kind of laid out what we do. And the idea behind those collection folders is to actually answer questions just like that. We have collections that we've been taking since the 60s, and the collection folder that has a single page from our previous librarian that says, yes, we'll take these. That might be all that you have, but for some of you that's probably more than you have at all.

I think that answers the question. I don't know if, Zack, you have anything you want to add?

ZACHARY: Don't think so. We do, when we get someone asking us about a donation, we'll do our best to see if we can't find anything.

Unfortunately, if that information isn't on the interwebs, we tend to not be able to give a definitive: Your records are nowhere else. It's just what you have. And many places, especially smaller places, do not have information about what collections they hold on the internet. It is an inexact science, but we do do our due diligence to try to determine what other places might hold records.

And that can be further complicated, too, by individuals associated with organizations having donated their records that relate to how they might have worked with an organization, but not necessarily the organization's records.

So it can get kind of complex, and that's a sort of a side example. But it is stuff that we do and find. And yeah, that all gets documented somewhere, usually.

KYLE: I would underscore... There's nothing more frustrating for a researcher who only has a limited amount of time and resources and goes to an archive expecting to be able to work in materials, only to discover, oh wait, half of the materials are at some other institution. It really is, underscores why here, especially at the CLA, if a church already has materials or an organization already has materials at another repository, it just doesn't make sense for a chunk of them to come here.

BILLY: I would also just note for us here in a lot of institutions, there is a section in our finding aids called related materials or materials at other institutions. And when we know that things are elsewhere, you know, we don't really like splitting up collections, but the nature of this work sometimes it happens. Sometimes we're calling out library material in other places. We do have the... We try our best to crosswalk between institutions whenever possible, but we can only do so much.

KYLE: Alright, so turning to the question and answer feed.

Anonymous attendee asks, so they've scanned some of their old record books. Is a library, an archive like the CLA, interested in the digitized images as well as the original records?

ZACHARY: Short answer, yes.

Slightly longer answer: If you have digitized records of your record books, those are certainly materials that we do collect, and specifically, older record books often fall under the purview of the New England's Hidden Histories program, which is run by Dr. Tricia Peone here at the CLA. So if you have record books of pre-1800-esque-ish record books, definitely reach out to Tricia, and she can provide additional information about what exactly it is we're looking for and the type of images that we're looking for for the digital archive.

In longer answer in general, if you have digitized images, repositories might want them. However, it also somewhat depends on the quality and type of images. Images of pages from your cell phone are probably not going to be what an archive wants. An archive generally wants something that is more of a close facsimile rather than a representation, or in an image form. And that sort of also is how we do digitization thinking in terms of facsimile quality.

We also, generally speaking, because we believe that digitization is an access project rather than a preservation project, we also always say if you have digitized something, make sure you have the originals. And, as a repository, while we do have digitized images of materials we do not physically hold, it is usually better for us to ensure preservation of the digitalized contents to also hold physical access of those materials. Not necessary, but definitely an added bonus.

And it depends, too, on what and how the digitization process came about and what agreements are in the place. But again, the short answer is yes.

KYLE: It does sound like a good rule of thumb that when you're talking to an archive, it's good to share everything that you have and everything that you know about that. You know, archives like ours will let you know in advance the types of things that fall under our collection development policy. But we would rather know the whole scope and make decisions from there.

So another great question here. Do you ever receive collections that have already been fully processed and do not require further processing on your part?

ZACHARY: Happy to answer that one quickly. Yes, we have received collections that are fully processed. Sometimes that happens. A church or an organization has had an internal archivist do the work for them, and then they've handed that work to us.

Sometimes it's the case of repositories will often, as we are going through our own collections, we will deaccession our materials and give them to a different repository that, if that type of material more closely fits with. We have that kind of relationship with a number of repositories. So when that happens, sometimes, yes, we do receive fully processed collections from other repositories.

They do tend to require still a little bit of work from us. We have to then import that into ArchivesSpace and produce a finding aid so that we can publish it on our website. However, it does require significantly less work from us. That is, that, creating the finding aid is honestly a small section of what processing usually entails. So it is always very nice when it does come to us fully processed because, yep, it cuts down on our work significantly.

KYLE: And also though, thinking about a recent wonderful church collection that's come in that was partially processed up into, I think, sometime in the 90s or early 2000s, and then there's the additional materials. So, in those scenarios, sometimes, right, you can build off of what's been done. But other times when you see the full picture, it might change things too, and it might require a reprocessing.

Another question here, are all the terms of gift agreement negotiable? What is non-negotiable for an archival institution?

ZACHARY: Generally speaking, the terms are negotiable. However, repositories will be fairly hesitant. They are written in such a way as to be, how do I want to phrase this? They can be negotiable. However, gift agreements are fairly standard across the board. We generally all draw on the same language bank to write our gift agreements, and they are written in that way for a reason.

The thing that is very much non-negotiable with gift agreements is physical ownership. Repositories require that for a number of reasons, from insurance, to legal issues that can arise, to a whole bunch of different things. So being able to say we are legally allowed to physically hold the material is incredibly important.

The parts that are more negotiable are often related to access rights. Donors have a good reason to often have say, hey, there's this portion of the collection that I do not want accessible until xy event or xy date. That is very understandable, and reasonable, and the things that we work with donors with a lot.

It's, but the terms more associated with specifically physical ownership and the rights that physical ownership comes with, those are usually less negotiable. We're always happy to have that conversation. I don't think we've ever had anyone actually take us up on having that conversation. We're happy to have that conversation. But the second those kinds of conversations come up, it does tend to put a little bit of a pause, at least on the donation process, to go over and thoughtfully think about that.

KYLE: To give a concrete example, there are certain grants that we actively go for, and those funding agencies will only support materials that we can demonstrate ownership over.

So, and this again goes back to the point that you guys have made so well here. For us to make these things accessible, we have to have the baseline tools and paperwork in place to be able to do that. And, you know, a collection here that's only partially accessible or not accessible at all, isn't doing anybody any favors, right? It's not helping, you know, the community that deposited it. It's not helping the researchers who want to use it.

Here's a good one from Cynthia Rigby, again, on the theme of concrete examples. Maybe, I know Zack, you've been answering a lot of these, but I think that you'll gravitate towards this one. Do you have a story of a lesson learned regarding copyright? What can go wrong?

ZACHARY: Yes. So this is a story of both copyright and digital access to oral histories. We have a... They're not technically oral histories, but they are interviews with a subject in our archives that cover a huge swath of topics that are very interesting, and we wanted to make these available digitally online.

Physically, we've already and always been allowed to make these available in our reading room, but as it turns out when you put things online, both sides of the interview process have a say in the availability of those materials. So as we were going to make these available online, we found ourselves in talks with one of the parties involved in those interviews, and for now at least, we've had to put a pause on that project to protect copyright of people involved in that project.

In general, with digital materials, pretty much every repository has a takedown clause because copyright of digitized and digital materials can be fairly complex. And the Digital Millennium Rights Act also provides protections and processes for takedowns. So pretty much every repository has a takedown section, and generally speaking, the process for there is someone goes, hey, I have a claim, or I have somehow related to this. Can we take this down temporarily, or put a pause, or take it down forever? Generally, the response from every repository is generally yes.

KYLE: Excellent. Yeah. Thanks so much for sharing that. Here's another great concrete question. This one for Billy. Our Zoom user writes, as you might know, First Church Congregational in Rochester, New Hampshire is attempting to collect and transfer some sermons written more than 250 years ago to CLA.

I'll just pause and say, thank you. These sound like a fantastic collection from what I've heard thus far. We would love to have them.

Zoom user asks, what type and extent of ownership documentation would you require when we request to transfer these? Great question.

BILLY: Hi, Sue. Yeah, so we'll definitely get into it more, but basically having documentation that shows you're the owner, either as just the entity itself is pretty self-explanatory. As the church itself, you do hold ownership rights, unless, which is a conversation that needs to be discussed.

So for everyone else, this collection is split amongst many different locations and individuals. The documentation that shows that such things were given to other individuals for a particular purpose, but the ownership still resides with the church, is the most helpful document humanly possible? I know that this also, this question also includes the local library being involved, so any documentation on the conversations that took place between the two will be helpful.

The way I personally look at it is if you gather together as much as you have humanly possible, we kind of come into it believing you. But as Zack was saying, you know, if someone comes up, and let's say we take on these sermons, which we're very excited for, and in a few years someone comes up with a document that says, as a matter of fact, I own these, we would have to hash that out and discuss that further. But for the most part, just being the church itself is almost always more than enough. If it's personal papers, being a member of the family is more than enough.

Another way to look at it, and Zack can jump in if he has an example. I've been working here for eight years and minus the example Zack brought up, I don't think we've ever had issues. And any conversations about ownership that do get brought up are handled civically, civilly, excuse me, and just, we just talk like normal humans, and we figure it out. I cannot recall a

collection we took on that we ended up taking without actual ownership. And I don't suspect that will ever be an issue in the future, but we will tackle those on an individual basis.

KYLE: One final question here from Kristen Johnson. She writes, you mentioned restrictions on accepting three-dimensional objects and articles. Could you talk a little bit more about what that, you know, your own collecting policy, our own collecting policy on 3D objects?

ZACHARY: So three-dimensional articles, objects, artifacts: communion silver, collecting plates, the commemorative plate from the 50th anniversary of your church. Basically these, the lingo is three-dimensional objects, more colloquially, artifact. These are objects which archives specifically are not typically prepared to properly handle or preserve. We focus primarily on prints and photographic-type materials, so paper, photographs, flat things. We're very well equipped to handle that. We're less well equipped to handle pewter silverware, or pewterware, or silverware.

Museums, on the other hand, are very well equipped to handle those kinds of materials. That's their bread and butter. Similar to artwork, art museums, and museums, and galleries, art takes a lot of specialized care to handle properly. Billy and I are not properly trained for that. Archives and libraries are not properly equipped to display, or preserve, or store those kinds of materials.

So a lot of archives will literally, will say, we do not collect three dimensional objects. We do not collect art. A lot of museums will say, we don't collect archival material. A lot of galleries will say, we don't collect three dimensional or archival. We all have our various areas of expertise in the GLAM: galleries, libraries, archives, and museums fields. And we say when we're doing collecting, we'll take your archival materials, your paper, but if you... perhaps your local museum will be able to take your communion silver.

BILLY: And I'll just quickly jump in before we wrap up because it happens a lot recently. And one thing we most certainly will not take, and we appreciate why you ask, we do not want your baptismal fonts. We cannot take those, and any objects like those where we won't take them and other places won't take them, I really encourage you to just reach out to the other churches in your town, your city, or your local area.

Having worked with many churches in the past, I know baptismal fonts, especially, have been given from one church to another, and different, within the different denominations, outside of the denominations. Just spread the wealth to other people, and there's no harm in just giving it to another church.

KYLE: Well, thank you both, Zachary and Billy, for another fantastic presentation.

And you know, never hesitate. You know, we're here. Ask us questions. Even if you're, want a little advice on how to work with your local historical society. We are, we want to be there to help you out at every step of the way.

So until our next program, be well, take care.