

# **CSI GOES DIGITAL: THE MANAGEMENT AND PRESERVATION OF YOUR CHURCH'S DIGITAL FILES**

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**KYLE ROBERTS:** My name is Kyle Roberts, and I am the Executive Director of the Congregational Library & Archives. Welcome to "CSI Goes Digital: The Management and Preservation of your Church's Digital Files."

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 into the future. For any 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 Congregational story and its ongoing relevance to contemporary society. We do this through free access to our research library of over 225,000 books, pamphlets, periodicals, and manuscripts, as well as 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 like this one and research fellowships for students, scholars, churches, and anyone interested in Congregationalism's influence on the American story. I do hope you'll check out our website, [congregationallibrary.org](http://congregationallibrary.org), to learn more about what we do and for news of forthcoming events.

Here at the Congregational Library, we're 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 records and how to maintain the missions... the mission and memories of their church community. Our archivists also recognize the challenge of not knowing where to begin. Hence, the Church Stewardship Initiative programs.

Since the fall of 2022, we have sponsored 10 programs in this series, many of which can be found on the Initiative's webpage. I encourage you to go to the Church Stewardship Initiative on the CLA website at [congregationallibrary.org/csi](http://congregationallibrary.org/csi) and learn more about these programs. The webinars are recorded so you can watch the video. There's a transcript, and there's also all sorts of supporting material.

And with that, let me introduce our speakers. Going first today is Billy McCarthy, who graduated with a Masters of Library and Information Science at Simmons University with a concentration in archival management. Billy started working at the CLA through a graduate internship and was hired full-time as an archivist in 2018. Billy's the Head of Reader Services, helping the CLA's visitors with reference requests and facilitating in-person research. He also serves as the collection manager for the archives, working with the CLA's offsite vendor to protect and maintain the organization's archival collections. Some of his professional interests include increasing access, collection management, processing of complex materials, and facilitating research.

After Billy goes, we will then hear from Zachary Bodnar, who also graduated with a Masters of Library and Information Science from Simmons University, also with a concentration in archives management in 2018. Now prior to his work at the CLA, Zachary worked at the Bellamy-Ferriday 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 materials for digitization through our New England's Hidden Histories Project. And then in 2018, he took on the title of Archivist. His professional interests include metadata collection and management, digital archiving, audiovisual preservation, and archives management.

So I'm gonna turn it over to Billy to start us off.

**BILLY MCCARTHY:** Thank you, Kyle. And good day to everyone who is tuned in for today's program, "CSI Goes Digital: The Management and Preservation of Your Church's Digital Files."

We are so excited to have you all here today. This is the CSI's 11th workshop and our first dive into digital material. We plan to start covering more digital topics over the year, so we hope that you stay tuned. The Church Stewardship program is in its fourth series of webinars, and we still haven't come close to running out of topics to discuss.

For those who are interested, every one of our past webinars is available to view both on our website as Kyle mentioned and also on our YouTube page. There is 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, you will go back and listen to these previous programs.

So let's go ahead and jump into today's discussion. I'm gonna start by going over a very brief introduction to various file types, and management, and structure. Like I said, we'll go over an overview of common file types you will encounter, discuss some thoughts and advice on effective file naming and overall structure that works for everyone in your church. Like many of the topics we've covered in our previous programs, the goal for today is to start a conversation and then expand out from there.

So to begin, let's just quickly go over the definition of what we mean by a file name or file extension. A file name extension is a short series of text characters at the end of a computer file name used to indicate the type of contents and the software that will be required to operate or open it. The digital age has seen a proliferation of file types, so I wanted to start by going over some of the most common ones I think you're likely to encounter. Some of the types I'm gonna mention may not be as used as others, but given that many of your collections may include digital files from across the last couple of decades, I thought it was best to quickly cover more than less.

That said, there have been so many different types of computer programs and files that have lived and died that I certainly will not be able to cover all of them. If you have files and I did not mention them, I will say a quick Google search with something to the effect of what does file extension X mean will usually come up with an answer very, very quickly. So let's go ahead and look through some common file types, starting with various forms of document or text file formats.

First up is the portable document format or PDF. It is a universally readable format for electronic documents. PDFs are widely used because documents converted into PDFs retain all of their features regardless of the application originally used to create them. PDFs can be viewed on any operating system with a PDF viewer program, though the actual creation is through Adobe.

Next on the list would be Microsoft Word documents, typically in doc or docx file format. This is a proprietary format owned by Microsoft and also one of the most common file types out there. The format is capable of storing multiple data types, including formatted text, plain text, images, charts, and more. Docx is the more expanded version of the doc, of the word document, and also ends up being smaller in file size and less prone to corruption.

Next up is the Open Document or ODT files, which are created through applications based on the Open Document text file format. This is a really excellent option if you do not want to pay money to join the Microsoft ecosystem, since you can download a variety of forms of software, the one I know of is called LibreOffice, for free. ODT files can also be easily converted to docx for relative ease of access.

Next up would be the Microsoft Excel spreadsheets, which are either in xls or xlsx format. This is another very common type of file, and I imagine all of you have one, if not several, in your own collections. Like Microsoft Word, this is a proprietary format. XLS is compatible with older versions of Excel if you have them, while xlsx is the newer version of the format and the one you're likely to see in your more modern documents.

Similar to the xlsx format would be cvs files or comma-separated values. This is an extension that represents plain text files that contain records of data with their values separated by commas, hence the name. Text files, or the txt extension, is the format you will come across if

you've ever used the notepad function on a desktop. It's a very simple format. That can be great if you need to quickly write something down without needing additional functions present in the other types of textual documents.

So now let's look on the right side here to go over some of the common types of image files that you will probably come across.

Joint Photograph Experts Groups, or jpeg, is a lossy image file format, meaning its quality will decrease with the file size. The output image, as a result of the compression, is a trade-off between storage size and image quality. JPEG is great for using images on websites or other kinds of documents, just like some you will see in this PowerPoint.

Graphics Interchange Format, or gif, is a file type that supports small clips or moving images. They're not meant to really be for high quality and are best for sort of small, quicker visuals. This is actually a proprietary technology, which partially resulted in the next format, or the png.

A png, or the Portable Networks Graphic, as I said, was made to serve as a replacement for a gif and is not patented, nor can it support animations. Besides jpeg, I would say this is probably the second most popular image file extension we come across in archives that we take on.

The last format I wanted to mention is the Tagged Image File Format, known as a tiff. TIFF is a standard for storing a raster, which just means rectangular, graphic and metadata that describes the image content and characteristics. This is actually a proprietary format, trademarked and owned by Adobe, although the specifications are published and made freely available. If you want to have high quality imaging, especially here at the CLA, typically that would come out in tiff format. Not always, but it is common.

So continuing on, let's talk about some other topics of video presentation and audio files. MP4s, or the Moving Picture Experts Group Layer 4, is a widely used format for video files. It can sometimes be of a lower resolution than other formats, but overall is a very common file type.

Audio-Video Interleave, or AVI's, is a proprietary multimedia format by Microsoft, and is considered very useful for preservation, which Zack will get into in a little bit.

For those with older videos, there's a chance you might run into the MOV format. These are made through the QuickTime program movie files that are typically made through Apple. I do not believe they really use the program anymore, but for those of you that have older files from across the last couple decades, I would assume you might run into one or two.

Now we're gonna talk about four presentation files. First up is PowerPoint, like the one we're all looking at right now, and is either in ppt or the newer pptx format. It is, again, through Microsoft and extremely common in many fields. ODP files or the Open Document Presentation are the open source equivalent to the ODT files I mentioned before and are great free alternative if you do not want to pay into the Microsoft ecosystem.

If you use Apple computers or Apple technology, then you may come across key file formats if you use their Keynote application.

Finally, with some audio formats. First we have the MPEG-4, which is the M4A file extension. And this is an audio format that is typically seen as being of better quality, but may not be as fully compatible with various forms of software.

In comparison, we have the MPEG Layer Audio 3, or the MP3, which may not be of the exact same quality as M4A, but is much more compatible with a variety of software and the file format you've probably heard of before.

Last, we have the waveform audio file or WAV, which was created by Microsoft and is uncompressed, meaning that the files themselves will typically take up more storage space. As an example, MP3s are compressed, thus they take smaller file sizes.

So finally, I just wanted to take a quick moment to note compressed files and database files. An archive file stores the content of one or more files with associated metadata such as the file name. An archive file is often used to facilitate portability, distribution, backup, and to reduce storage use. If you download an email that has multiple attachments, typically, they will put those together into a zip file.

Other kinds of common formats would be the raw RAR file or a GZ compressed file. Lastly, I chose to end with a quick note about Microsoft Access, since I think it's a great example of a program that used to be far more commonly used than it is today. You may find that important files exist in a platform that is either hard to find or maybe completely discontinued. You can still today get access to Access, but I highly recommend you move away from this format as soon as possible. In case you have anything stored away, you never know when it might become even more difficult to acquire Access than it is today.

Now I do want to recognize that I just went through like 20 different formats with incredible speed, but I felt it was really necessary for everyone to hear these names and file extensions alongside a very basic understanding of what they are in case you come across these files and you might not know what they are.

So switching gears a little bit, I want to talk a bit about file naming and structure.

When it comes to naming files, you want to establish some rules and then stick to those rules. On the screen is an example of files from our own internal archives department. The file name starts with a very clear explanation of what the file contains or is about, then followed by a date. We recommend using dates following what's called the ISO 8601 format, or ISO. And that format does year, then month, then day, in order to prevent any confusion across international date conventions as it orders that information from largest to smallest. You'll also see for the digital gift agreement that there is a further extension at the end to signify a version that we use for our digitization program, NEHH, and another for everything else. That's why it's called generic. Again, the goal here is to make something simple, easy to understand, and not overly complicate.

A file name should make sense to everyone, not just the person who created the document. I have included a little joke and comic here that perfectly encapsulates my point. You may know what "Untitled 242" or "Untitled 243 IMPORTANT" means, but unfortunately no one else will. When working with digital files for your church, you want to make sure that you are creating a file structure that can be used by people across the church, both now and in the future.

I would suggest coming up with a plan first of what you think the top categories of files you have. You could even consider doing a trial run with one particular set of files to get a better sense of how to do this organizational work. You are in a sense doing a form of archival processing, but instead of physical records, you're using digital records.

I would guess that everyone here would benefit from a structure that includes kind of top-level folders such as administration, church organizations, or finances. Most of you will probably have all three. On the screen is an example file structure, again, from the archives department here at the CLA. Please keep in mind that this is just a single piece of our larger file structure, so what you will be producing will have a lot more categories. You're basically seeing an example of one step below the top-level organization.

The file names I showed you in the previous slide can all be found under the Archives Forms section, and all of our forms will be there. And we should not be seeing forms in the projects or reports section, for instance. Whatever plan you come up with, make sure that somewhere, either in a text document or something else, you write up a very basic explanation as to your reasoning for doing certain actions. This is less for people like now and today, but it will be very beneficial in the future for whoever takes up the work next.

You'll also want to keep the structure simple and not to overthink or overcomplicate things. After you've kind of come up with this initial plan, consider asking someone else in the church community to look it over and see if everything makes sense to them. If it does, then you can move forward with actually moving your files around, and renaming them, and setting up the organization. And also keep in mind, once you have your plan, be sure to remain consistent with your current files and all future files. If you put a lot of great effort into a good scheme

that makes sense, and then a year later you completely ignore it, all that excellent work you've done is gonna be lost.

The process will, like many other aspects of good records management, take time and will not be complete instantly. But by being methodical and smart, you can bring order to your digital chaos.

So thank you for listening to this very quick run through of topics on files and structures. I am now gonna pass it over to Zachary to continue the conversation. Take it away, Zack.

**ZACHARY BODNAR:** Hello, and thank you, Billy. Now, let's retread some old territory with an eye towards the digital records you have likely been producing for the last decade or two and will continue to produce for the foreseeable future.

Records management programs are an integral part of the administrative to archive pipeline. And these programs affect your digital records just as much as your paper records. So CSI has already had a program on records management in the past, which you could find on our CSI page. Honestly, it is one of the programs I am most proud of and definitely recommend giving it a listen to.

But for those who haven't seen that program, a very, very brief recap is warranted here. In short, records management is the active process of creating, documenting, organizing, and preserving important documents within an organization. Records management tracks the life cycle of a record from its creation all the way to either its destruction or its long-term preservation in an archive. Records management programs are defined by a policy known as the records retention schedule. This schedule defines both document types and their disposition, meaning how and when documents are either destroyed or placed into the archive.

Records management is a key aspect of any archive program, and that includes the active management of your digital files. Records management sees no difference between born digital documents and paper records. Both are, well, records. The only difference really is the medium, paper versus digital ones and zeros on a computer screen. It is imperative that digital records be treated the same as you would paper records. They are not less valuable from legal, administrative, and historical perspectives.

There is also a common fallacy that archives programs at least try to train out of us that supposes that age denotes some kind of inherent value. And I mean this in the way archivists denote value, aka having some sort of research, historical, documentary, or evidentiary value within a specific context. Age plays almost no role in defining archival value. Some old things simply have little historical or research value, while plenty of the digital-only records being created right now will be rich in historical and research value moving forward.

Records management programs already make distinction between documents which are created, but hold no intrinsic long-term value and records which ultimately will be stored in the archive owing to their value. On the digital side, we do see a lot more of these valueless documents, mostly because digital documents are way easier to replicate or see many, many, many many draft versions of.

Often the records management program will only want to archive the final version of a document. All other drafts, copies, working files, and versions can usually be safely destroyed. Exceptions exist, but this is a good starting point on that topic. Governance documents which are maybe updated every other decade or so, yes, you want all of those final versions of those documents. But meeting minutes? Only the approved final version is really what should be archived. You don't need multiple copies of the unapproved minutes in your digital archive.

Mostly I bring up these examples as illustrative of why version control is important. Because when moving things into the archive, you need to be able to determine if the digital file is actually the correct one and not a random draft or a weird copy of a copy of a draft.

When I talk about version control, I'm not necessarily speaking of the same exact process that software engineers go through to version code and such. There's no need to create complex backend systems to merge code bases and document the smallest changes. What I'm talking about are relatively simple things one can do to identify documents as drafts, copies, or final versions.

Final versions of documents, aka documents existing in the active and within the inactive storage sections of the record lifecycle, should be either saved as uneditable documents, such as a PDF, or as read-only files, something that, for example, Microsoft Word has built right into it.

When documents are actively being created and edited, or when a document is expected to be updated over time, it may be appropriate to add version numbers to either the file name or somewhere within the document. Version numbers can be as simple as just a numerical sequence, like one, two, or three, or it can be more complex, like what we see within the programming space. Even a date, as Billy kind of showed, can be used as a type of version control, with the latest date assumed to be the most up-to-date version.

Which does remind me, always date your documents. Do not rely on the computer to know when a document was created. It is very easy for the computer to overwrite that info whenever the file is moved or copied. So yeah, for the sake of future archivists, me, always, always, always date your documents within the document itself, whether they be minutes, correspondence, or a new version of your bylaws.

Digression aside, for complex documents that are expected to be updated periodically, or important governance documents where changes are necessary to be well documented, I honestly think adding a change notes appendix to a document can be helpful. This can be something as simple as stating briefly the who, what, when, and why's of a change to a document. Admittedly, this is a really extra process and super optional, but it can pay off in the long term as it documents how something has changed over time, even if we don't have all of the versions and drafts saved within the archive.

The record that goes to the archive should always be an uneditable document. There is a reason that PDF is the default archival file type for most text-based documents, which serves as a nice teaser for our next section. But before I move on to that section, I do want to spend a couple of moments to just briefly talk about version numbering. Admittedly, this means veering slightly into the world of software development, but I think it's worth it.

Version numbering, like what is depicted on the slide, is relatively standard across the board, although you can certainly get way more complex or creative with it. In the example here, the first digit, or leftmost digit, is the major version number. Major versions in our document-focused context are likely to be newly completed and approved versions of a document. The second digit is the minor version. In software, these would likely be small updates with content or some minor noticeable changes to the program. For us, just thinking again about documents, these are likely major drafts or minor approved changes and edits to a document following a major new version. Finally, the last and rightmost digit is for patch numbers. In programming, these are often the bug fix patches that only fix existing code and do not really introduce new code or features into a program. Honestly, I struggled thinking of any real good reason to use this third set of numbers in your own documents if you wanted to version number your documents like this, but if there is a document that gets updated incredibly regularly, you could consider this third set for that. But again, that probably is a little overboard for what we're honestly talking about today.

Again, we're not advocating for adopting this kind of version numbering on all of your documents. In fact, I think it is probably overboard for most things. However, this type of version numbering is the most common type out there, especially if you look up additional information online.

Now let's talk about an incredibly important and frankly scary topic, and the topic that most likely brought you here today, digital preservation. Before I go further, a quick disclaimer. If you have been in one of our CSI programs before, you have probably heard either Billy or I say something about like what I'm about to say.

But for any new listeners, in short, digitization should not be thought of as a type of preservation. Under current thinking on the topic within the archive and digital humanities spaces, digitization really is only thought of as a method for increasing accessibility to your materials. Paper is still considered the best preservation medium right now, especially when

compared to digital surrogates. Paper has been proven to last a very long time, even in fairly iffy situations, while digital has been shown time and again to suffer from inherent flaws that are likely to cause loss of data the longer the timeline is.

And as always, if you do digitize something, never destroy the physical version. One of the reasons the two of us here have taken this long to really get into digital preservation as a standalone topic is that frankly, digital preservation is really scary. We, as an archival field, haven't really figured it out. Digital preservation can be done, and done well, but the amount of technical know-how, institutional backing, and costs involved make great, in quotes, digital preservation near unattainable by almost any modest institution, let alone small places. This is not even considering the realities baked into digital-only mediums that make perfect preservation and long-term accessibility almost impossible. And all that combines to make it really difficult to talk about it. How can we provide authoritative advice when we as a field have simply not truly figured it out?

We're not gonna be able to give you a full proof list of best practices here. Instead, we'll try to focus on distilling some of the basics of digital preservation into a, hopefully, easy-to-follow list of workable practices for small institutions.

Let's start with a bit of a definition drawn from my own experiences and thoughts. Digital preservation is a purposeful set of activities focused on actively mitigating the loss of digital information over time. And emphasis should be placed on actively mitigating. Digital preservation is not like paper preservation, where assuming you have a climate-controlled room, you can essentially leave it in there and be done with minimal needing to go back into that room. Digital preservation, on the other hand, is always ongoing. Furthermore, at this current time, the best we can do is mitigate against the loss of digital information. Much like 19th century leather bindings and their tendency to red rot, there is little we can do to truly prevent the loss of data over a long enough period of time.

As I've already said and will emphasize here again, we aren't going to be providing the types of best practices that you might see at a leading institution in the field, like MIT, when it comes to digital preservation. Unless you have access to Linux-based computers running the types of digital forensics tools that law enforcement agencies use to create byte-by-byte disk images of hard drives, you probably aren't going to be able to follow true best practices for digital preservation. Don't worry, you're in good company with almost everyone else. That's why we'll be focusing on what I'm calling workable practices here. We don't want to leave you discouraged today with goals that are unattainable. And when looking at workable, there are two main avenues to focus on. The first is to look at the types of files you are moving into your archive. The second is to look at how you are storing those digital files in your archive.

Earlier in this presentation, Billy spoke of common file types and, more broadly speaking, the categories of file types. Here is where we return to that topic. While we are forever reliant on the benevolence of megacorporations and technocrats to follow through on what they say

they'll do, there are some file formats which are expected to be supported in at least the medium term. Meaning, these are formats that we expect that for at least a decade or two will continue to be supported on all major operating systems.

When moving inactive digital documents to the archive as part of the disposition phase of the record lifecycle, it is important to assess the types of files and, when needed, convert them to preservation-ready file formats. This slide lists some of most common file categories you will run into in your own church and the types of file formats they should be converted to before moving them into the archive. Generally speaking, most programs like Microsoft Excel and Word will natively have the option to save documents into the preferred preservation formats. Most image and editing and viewing programs, such as those found on default Windows and Mac computers, can likewise easily save most things as PNG. As a slight side note, TIFF is more often found on the digitization side of the world, so I'm not gonna really be saying everything should be converted to TIFF. Mostly you natively create TIFF when you digitize or create new image files.

Audio and video files, on the other hand, can get real complicated really, really fast. Basically, I don't have time to go into details in this program, but there's a very wide variety of video files. There's a wide variety of how those video files and audio files have been processed, what codecs are involved, how and what kinds of DRM has been placed on those files. It gets real complicated really, really fast.

In short then, what I can do here is I can at least recommend for most situations a VLC media player. If you've ever seen it, it's the program with the traffic cone icon. It is a safe, free, and useful tool for converting audio and video files, as it is what I use here at the CLA to convert files and occasionally to rip content off of CDs and DVDs when I see them come into the CLA's archive.

Perhaps the most important thing for your archive of digital records can be boiled down to the storage of those files. First thing first, your digital archive should be completely separated from your church's storage for active and inactive documents. Depending on your tech setup, your digital archive can either be a unique partition on a hard drive, a separate drive in a server, a specifically marked external hard drive, or even a bespoke cloud-based file structure.

The main point, though, is that your digital archive needs some degree of separation from your church's regular file storage. Some of that is security. However, perhaps even more important is that keeping things separate will just help to ensure that no one mistakenly edits, copies, or deletes those files somehow. Furthermore, it helps to denote a clear moment when a document becomes archival versus just existing on the admin's computer somewhere as either an inactive or active file as per the document lifecycle.

Another thing to do is always have backups. If you have a digital archive stored on an external hard drive, maybe also have a copy of that digital archive on a cloud service, or vice versa. Basically, you always want multiple copies of the digital archive stored in different geographic places. This does make more work for you. Again, digital preservation, though, is active mitigation. It means you need to ensure that both copies of the archive are always complete and duplicative of one another. But it helps to prevent disasters caused from either a technological failure or a physical disaster such as a fire.

If you have documents or photographs stored on SD cards, DVDs, CDs, or flash drives, or other mostly external file storage mediums, remove them from those storage mediums and place them into the bespoke digital archive. These storage mediums are even more prone than hard drives to failure, especially once we look past a decade. Do not risk the loss of important materials to having them just be kept on a random data CD somewhere in the office. Yeah, don't trust CDs. They claim to last decades; the best guesstimate is that really they're safe for maybe a decade, and anything after that is a huge shrug.

A part of the records management process... as part of the records management process, have at least one specific time each year for the transfer of digital records from the church to the archive. Do not do so on a rolling or ad hoc basis. That will lead to confusion and duplication of work. This is partly why retention schedules, as described in our past program, are incredibly useful. Use that retention schedule policy to dictate the when, who, and how digital documents are moved from one place at the church onto your digital archive.

One final bit of advice that gets lumped into the storage category is that you do not want your digital archive controlled solely by a single person. Digital files are easy enough to lose without the added worry of a password being lost due to someone moving out of town. Your digital archive should have policies around who can access those files, what passwords are needed to access those files, and how to transition people as they gain or lose access to the digital archive.

And that brings us to the end of another CSI webinar, at least the slideshow portion. Thank you again, as always, for joining us. We understand that there was a lot to cover this time around in a relatively short amount of time. So we look forward to the imminent Q&A section. Now back to you, Kyle.

**KYLE:** Well, no joke, that was a ton of information, but really fantastic material.

I think what's kind of striking me as I let sink in all that you've just shared is on one hand, this is such a great reminder of how to keep our organ... how to keep ourselves well organized in the first place, right? To think about the intentionality of what we're doing. At a small institution, excuse me, like a church, like a library, you know, if I won the lottery tomorrow and you had to go in and look at my files and find something, it's important for us, right, to be intentional so that there... so that it, we're not obscuring pertinent information.

So I think, you know, especially what you were kind of walking us through Billy, I think some really great ideas there for how we can, maybe make a little list of steps to follow and look at how well we've been, we've been doing it.

And then Zack, I think what you gave us, which is really great is something that I think comes from your own experience as the keeper of the library's files, right? So one of the projects that folks out in Zoomland might not know is, before I started, immediately before, Zack went through and brought all of our records up to date. So we have an archival collection for the library as well.

And so I wonder, maybe my question I'd start off with for you, Zack, is in your position, right, and you're gonna be analogous to the person at the church who is going to be responsible for collecting all these materials. How proactive should you be in managing all the people you work with? For example, should you be saying in your role, and if you're the person at the church who's doing this, should you say, you know, at the end of every year, I want you to send me these files, and they should be in these formats, and they should have these naming conventions. Is that doable, or would you say that it's your job to just have people send you the stuff and then you do the work of doing the conversions and making sure everything is right?

**ZACHARY:** So, in an ideal universe, I believe that records managers should be tyrants and control all levers of government.

More seriously, there is definitely always a push and pull on the records management side. Even at professional organizations, records managers are having to work in collaboration with all of the departments they interface with. They cannot themselves make demands or create policies by themselves. Those policies always have to be done in collaboration.

The most important thing though is just consistency. However that policy comes into being, once that policy does exist, to not go back and revisit it every three months or ignore that it exists. You can revisit the policies, and you almost certainly should after a certain amount of time. I think that's healthy with all levels of governance in policy related documents. But it's... the reason we create policies is hopefully to create both documentation on how and why we do things, but also to create at least a little bit of push and pressure to follow through on those policies. So yes, it is a collaborative effort.

But once a policy is set, to at least continue to try to follow through with it until a review period and then maybe revisit and revise. Certainly there is definitely always, again, even in well-oiled machine institutions, a lot of push and pull between what the records manager wants and needs versus what is feasible in a given organization.

**KYLE:** I love that you've given our records managers the invitation to be tyrants, [LAUGHTER] but temper their expectations that they might in fact be doing, they might be the ones more attentive to this checklist.

So Deborah Barrett asks, this was a question that came in during your presentation, Billy, what format does Google use? I think she's asking if you download slides or if you download something from Google Suite, what format is being used there?

**BILLY:** Yeah, so... or mute yourself, Zack So what's great about Google, and I should have mentioned this, is when you go to the download function for your Google Slides, or Google Docs, or your Google Sheets, you get an array of options to pick from. Google doesn't, I don't think has its own proprietary version for files. It literally just lets you pick from all of them.

So as, for example, I pulled up a Google Slides like you in your example, and I mentioned one, two, three, four... six of the seven viable options. So you can kind of just pick and choose if you want to do a PowerPoint, Microsoft PowerPoint, if you want to do the ODP, which is the free version I mentioned, if you want to do it in PDF. All of those are available right there for you. And that is true for all of Google's various options. It's just file and then download.

**KYLE:** And you can likely have that same functionality in Microsoft Office products as well, right?

**BILLY:** Yeah, exactly.

**KYLE:** And I think that, giving yourself the time to just kind of familiarize yourself with the modes that you have for downloading. I'm taking away from this, thinking about my own files here, about being intentional, right? And saying, I just got the board to approve the budget. I'm not gonna keep all the earlier versions of the budget. I'm going to make sure I save in the right format the final version of the budget, and then not touch that.

I love this question from Jerome Fong. It's one that I have myself. So if I store my data in cloud storage, like Google Drive, do I still need to have multiple copies of my files on different media locally? Google Drive is supposed to be automatically backed up and distributed to different regions within their cloud network. And I think it's supposed to be really secure. Is that enough?

**ZACHARY:** And there's a couple of questions later on that are similar to this. As I think someone else, their word was sufficient. And I will say, Google Drive is probably sufficient for your needs.

The main concern with all of the cloud services, while I recommend using them for digital archiving for a small institution, that the caveat is essentially you are relying on our good

friend Google who has never done anything wrong, or never let a product die, or... to continually backup and safely manage your data. The reality of our current situation is that we don't have anything other than mega corporations to rely on. So we kind of just have to pick our poison when it comes to cloud services, which is why I do say yes, they are sufficient. They are... generally speaking, we... as long as you put information into there, we are not expecting that data to be lost, probably, hopefully.

However, I do also kind of always recommend to have a local copy too, if that is feasible. because then you at least have something local on a hard drive that isn't also potentially being used to feed AI somewhere. Also, that's a possible concern that we need to have in the 21st century now. Yay, technology! It's always helpful, but I'm digressing.

**KYLE:** Maybe raises a protocol question. Say you are using Google Drive. Should it be a personal account or should it be an institutional account?

**ZACHARY:** I would say an institutional account, if that's at all possible. Hopefully your church has at least a small budget that can be put towards something like that. That also helps to prevent the problem of the person being in charge of that Google Drive departing and leaving town, and that password and access to that account suddenly lost. Having an institutional, or having at least it attached to an institutional email is probably the best way forward on these cloud services.

**KYLE:** Great question from our friend, Sue Veal here. So you've just been talking about Google. Are all cloud storage options the same, like so if it's not Google is it Dropbox or OneDrive? You know, do you have a preference, or...?

**ZACHARY:** I don't have any real preference at this point. They feel very samey to me. It's kind of pick your mega corporation poison and stick with it. Google has a really nice interface. Microsoft is Microsoft. Dropbox has got a good chunk of features for sharing if you need to share files between two, especially large files between two different dropboxes. So yeah, I mean, Google's probably fine. It was probably be the one I recommend most easily just because user interface is really simple. Google does a really good job of UI design at least, but they're all relatively equally usable for whatever your purposes are.

**KYLE:** Now would be a good time for me to say that the opinions expressed in this program represent those of our archivists and not of the institution itself.

Great question here from Joseph Fahs who asks, and you know I think about the number of times I've seen photos coming into the archive so I love this question. What are some best practices for creating and organizing a photo library of photos taken by the church community? You know, as we think about different file types and how to pull them together. And maybe if this has already been covered by the retention policy program, we can point to

that. But, what do we do? Churches love taking photos, and how do you preserve them? I think we're talking about born digital photos here.

**ZACHARY:** My general advice would probably be first and foremost to organize them by event or date, if at all possible. Archivists tend to think in those: topical information and date information. So if you have photographs from your 4th of July party, just stick them in a folder. Maybe it's Church Photographs, Community Events, 4th of July Party 2026. And that's a pretty good type of structure to be able to at least store the photographs and make it at least relatively understandable of both the when and the what of that photograph.

In an ideal world, you would go into each individual photograph and add a whole bunch of metadata about who is in those photographs, and what day, and who took the photograph. However, when you are managing potentially hundreds and hundreds of photographs collected by a large community, that is a dauntless task and is not one that I recommend necessarily going into, but the, technically the option is available in I believe pretty much Microsoft, and Mac, and almost all computer systems that allow you to view files, or photo files, to add that and tag that kind of metadata information directly into the file itself.

But again, just that sort of top level Photos, Community Events, July Party 2026. So that's a really good way to at least topically store the groupings of photographs.

**KYLE:** Great, I'm just gonna squeeze another question or two in here. There are so many coming in.

Nancy Knortz asks, we have sermons on cassette tapes and VHS tapes. We're not sure if they're still viable, but we do want to look into seeing if we can update them to CD with the assumption that it will also be uploaded to the cloud. We were questioned if this is worth it. I assume it's yes, but what are your thoughts? Do you agree that it's important to keep these sermons on cassette tape and VHS? Is CD the right way to go? Is the cloud the right way to go? And she promises to let us know how it turns out based on your answer.

**ZACHARY:** No pressure from me. So there's always gonna be a cost. I tend to think that the cost is probably worth it if you can absorb that cost. If not, then that's a budgetary constraint, and I'm not gonna force that issue.

But if you have the space and the budget to go and explore this, I do think, especially for VHS and cassette, it is worth it to send to a vendor to have a digitized copy available. VHS and cassette are relatively stable formats. So as long as they are in a fairly stable climate-controlled environment, they aren't expected to degrade like older film reels and other earlier pre-data tape types of moving image and audio storage. So they're not likely to suffer irreparable harm if you just keep them as VHS or whatnot.

But obviously the issue becomes as years continue on, VHS players are basically, you're only buying secondhand market at this point. Cassette, similar situation. We had to search for a company that actually still produced a modern-day deck tape. And actually this gets really into the weeds, but the companies that produced the things that allowed audio from cassette to sound like audio from cassette no longer make that codec or whatever it is anymore. So like, yeah, if that's your concern, then yes, forward converting into a digital format.

I do not suggest putting it on a CD. I would suggest having that file as either part of a cloud on your cloud server or on a digital file on a hard drive somewhere. CD, as I've said before, they are prone to damage after about 10 years. Some say they can go longer without issue. However, after 10 years, the chance of that damage occurring every year after just increases until at some point something happens. So CD is eventually going to be the new VHS. So I don't really ever suggest putting it on something like a CD.

**KYLE:** A final question, which I think intersects with what you're just saying. Amy Elbert asked if you could just say a little bit more about the VCL media player tool. Their church has boxes of old DVDs and CDs that need to be reviewed. Some may not be worth saving, but they want to evaluate... view and evaluate them. And like many institutions and many churches, they do have a limited budget to buy devices to convert.

**ZACHARY:** Yeah, I can speak a little bit about it. I'm admittedly, I'm not a power user, but VLC media player is first and foremost a media player. It's a very good one in that it can basically view any kind of media. I can't tell you how many times I've put in an old DVD from a church collection into Billy's disk drive. He has one of the only disk drives here at the CLA. And Microsoft tries to play it, and it's just like, no. VLC will almost certainly be able to view at the very least, view anything, or if it can't view it, it's probably corrupted beyond repair. So at that level, VLC is super great.

I have also had decent luck, although it takes a little bit of finagling with VLC when it comes to either ripping DVDs, especially if they are technically protected DVDs, which aren't supposed to be able to rip. VLC can, but it sometimes fails for reasons that are confusing to me. But it certainly has the ability to convert files from one video format to another and audio format to another, while retaining a lot of the sort of information that is secondary but useful to kind of maintaining that DVD or CD experience.

So it is my go-to tool. It is free to download. It's technically, I want to say it's an open source software. Although I don't recall if that's actually true. But at the very minimum, it will allow you to review those DVDs and CDs, and then hopefully be able to also use that to rip them onto a more permanent and hopefully stable solution.

**KYLE:** Fantastic. And remembering all that after you remediate it, hold on to the original just in case.

So thanks everyone for being here today. Please reach out at any time; [ref@14beacon.org](mailto:ref@14beacon.org) is your direct line to both these guys. Zack and Billy, once again, thank you for sharing your expertise and giving us your time. We look forward to seeing everybody at the next program.

**BILLY:** Take care, everyone.