

Preserving Congregational Archives: Resources and Institutional Information

The following information is provided to you by the Unitarian Universalist Association's (UUA) office of Information and Public Witness (IPW). If you have questions about any of this, please contact the UUA Information Assistant by telephone at (617) 948-4652 or email at info@uua.org.

Resources for Congregational Archives

Congregations are encouraged to preserve archives and artifacts relevant to their congregation's history. These records can be housed on-site provided that the congregation has sufficient secure space. Any item of significant value (e.g., church silver, documents with valuable autographs, etc.) should be placed in a fireproof safe or removed to an off-site location (e.g., a bank vault).

If the congregation does not have adequate storage space on-site, it should consider sending its archives to an institution that will preserve the documents and provide public access to them. Such institutions include local public libraries, local historical societies, or major research institutions such as Andover-Harvard Theological Library (the library of the Harvard Divinity School in Cambridge, MA).

In this document, the UUA IPW office offers several resource articles to assist congregations in their archival work. These include:

- "Maintaining Records and Archives," from Chapter V of the UUA *Congregational Handbook* (also available online at <http://www.uua.org/leaders/leaderslibrary/congregationalhandbook/index.shtml>)
- "Archives: Keeping Local Congregational Records" by Heather Watts, Unitarian Universalist Church of Halifax, Nova Scotia
- "Common Memories, Common Hope: Help and Inspiration for the Local Church Archivist/Historian," in *Today's Ministry*, vol. XVII, issue 2, summer, 2000
- "Keeping Congregational Archives" by Bruce C. Harding, Pacific Northwest District of the UUA
- "Church Historian," a Shared Ministry job description from the First Unitarian Universalist Society of Marietta, OH

Information on Institutional Archives

The archives of the UUA (including institutional records of its predecessor institutions, the Universalist Church of America and the American Unitarian Association) are held by the Andover Harvard Theological Library (AHTL) of Harvard Divinity School.

The AHTL archive includes materials from some congregations, official minister records, and Unitarian Universalist-related books/sermons/etc. You can search their online catalogue, HOLLIS, for all of the materials in the archive: http://tiny.cc/hollis_ahtl.

Staff at AHTL are professional librarians, researchers, and archivists. Please contact them with your research questions and to get help in searching the archives. You can reach Frances O'Donnell, Curator of Manuscripts and Archives, at (617) 496-5153 or frances_odonnell@harvard.edu. You can reach Clifford Wunderlich, Head of Access and Research Services, at (617) 496-5409 or clifford_wunderlich@harvard.edu.

Due to a lack of secure storage space, the UUA does not maintain many archives at its offices in Boston. We do maintain a collection of files on all UUA member congregations. You may learn more about this and the research services offered by the IPW office by contacting the UUA Information Assistant by telephone at (617) 948-4652 or email at info@uua.org.

Fourteen

Maintaining Records and Archives

One cannot overemphasize the importance of maintaining adequate records for the congregation or fellowship. The minutes of meetings, financial records, and membership records comprise the ongoing story of the life of a congregation; they provide the data necessary to short-term and long-range planning as well as the information needed to complete the Unitarian Universalist Association annual report questionnaire. Moreover, these records contain the basic information vital to composing a history of the congregation. Failure to maintain congregation records endangers the harmony of the congregation by resulting in a lack of information on which to base decisions and a consequent confusion over methods and goals. Maintaining congregation records, therefore, should be a priority.

Minutes

Minutes should be recorded for all meetings of the congregation, the governing board, and formal committees. The minutes should provide a source of information about official actions on the part of the congregation, board, or committee without being so detailed that they are difficult to write or read. Here are some guidelines for recording minutes.

- Minutes should always record the date and time of the meeting.
- In meetings of the governing board or committees, the minutes should name those present; for a congregational meeting, it is sufficient to indicate the presence of a quorum.
- Minutes should note the name of the person chairing the meeting and the person taking the minutes; the names of those presenting formal motions may be included if desired.
- Minutes should carefully record the exact wording of formal motions even if not voted on; for motions that are brought to a vote, minutes should record votes for and against as well as abstentions.

- Minutes should also record general understandings or consensus reached at a meeting despite the absence of formal motions or votes. It is not necessary, however, to record the details of every discussion held at the meeting.
- Minutes should include the names of those people elected or appointed to assume various responsibilities.
- The minutes of meetings should be examined by the participants for errors before being accepted as an official document.
- The official minutes of any meeting ought to be available on request to all members of the congregation. Many congregations publish the minutes of important meetings of the board and congregation in a newsletter; other congregations post these minutes where members can view them.

Annual Report

Many congregations publish an annual report in conjunction with the annual meeting of the congregation. Such a document customarily includes a report from the president, the secretary or clerk, and the treasurer as well as a summary of the activities of each committee, interest group, and special task force.

A copy of the annual report should be distributed to all members of the congregation and can be included with the materials given to new members, prospective ministers, and interested others. A copy should also be sent to the Public Information Office of the Unitarian Universalist Association to be included in its congregation files. Finally, additional copies should be kept for future reference.

Electronic Recordkeeping

Many problems inherent in the collection, storage, and transmission of congregation records can be eased through the use of electronic recordkeeping. After surveying available congregation management software, the Unitarian Universalist Association recommends to congregations the Church Organizational Management System (COMS). COMS is an advanced and comprehensive congregational software program that can handle nearly every aspect of running a congregation. COMS allows congregations to track members, prospects, and pledges. Information from this program can be passed to most popular word processing programs (e.g., WordPerfect and Microsoft Word).

COMS is available in both Macintosh and IBM-compatible versions. Questions and orders should be directed to Specialty Software at (407) 728-1199 in Evanston, IN. Other questions about electronic recordkeeping can be directed to the Unitarian Universalist Association Computer Services Department.

Other Important Records

In addition to the minutes of meetings and the annual report, other documents should be carefully preserved.

Preserve all documents that pertain to the congregation's affiliation with the Universalist Church of America, American Unitarian

Association, and Unitarian Universalist Association; the congregation's articles of incorporation; and its bylaws, including all revisions and amendments.

Keep at least one copy of all congregation publications, such as newsletters and brochures, for newcomers to the congregation. These documents will provide essential information for writing a history of the congregation.

Record Storage

All official documents should be kept where they are safe yet accessible. For older records, this means in a fireproof cabinet located in the congregation or parsonage. As noted above, electronic storage of information eases many problems: copies of documents can be stored in the computer and on diskettes to facilitate retrieval and transmission.

Confidential Record: Memorial Service Preferences

Some records may need to be kept confidential in a congregation. One such form is the record of stated preferences for memorial services. Here is a sample form.

Full Name _____ Date _____

Date of birth _____ Birthplace _____

Social Security Number ____ - ____ - ____

Mother's name _____ Father's name _____

Names of brothers and sisters _____

Name of spouse or partner _____

Name(s) of other significant person(s) _____

Name and addresses of children _____

Marital status _____

Date of marriage or service of holy union _____

Place of marriage or service of holy union _____

___ I wish to have my body cremated and have a memorial service.

___ I wish my ashes to be _____.

___ I wish my ashes to be buried in _____ cemetery located at _____.

___ I wish to have a memorial service with private burial before or after the service.

___ I wish to have a memorial service with no graveside committal service.

___ I wish to have a memorial service with graveside committal service.

___ I wish to be buried in _____ cemetery, located at _____.

I wish to have my service held at:

_____ Unitarian Universalist congregation/___ in my home/___ other: _____

I would prefer, in lieu of sending flowers, that my family and friends make memorial gifts to

_____ Unitarian Universalist Church

other: _____.

I make the following suggestions for material I would like to have used in my service. (Include title, author, and reference, whenever possible.)

Responsive Readings

Songs/Hymns

Poems

Other Music

Speakers (name, address, phone number)

Other Suggestions

Other wishes I have about my memorial service:

Writing the History of Your Congregation

A shared history is a powerful bond and an awareness of history can foster a sense of pride and a feeling of connectedness. The telling of this history, whether in oral or written form, is one of the most important ways that newer members of a family are welcomed into the group.

This sense of history is equally important to a congregation. A sense of who we are is partly dependent on who we were. A history of your congregation can reveal stories of its struggle to survive and prosper, stories replete with setbacks and successes. But this history has no value if it is hidden; it must be shared. While it is important to preserve oral narrative, a written history is essential to the transmission of the story (or stories) of your congregation's past.

When to Write

Anytime is a good time to write a history, but the support needed for such a project is most easily generated as part of an anniversary or commemoration. Many congregations have produced congregation histories on the fiftieth or one hundredth anniversary of the founding of the congregation. The anniversary of a minister's settlement is also a good time for people to cooperate on writing a history. Even a municipal celebration can be a catalyst for starting the work. Keep in mind that research and writing are frequently frustrating and always time consuming, so allow plenty of time to complete the work.

How to Begin

The first step is to involve as many people as possible. A small committee should be created to supervise and coordinate the project; it can decide how the work of research and writing should be divided.

The older a congregation is, the more history it has to be discovered and recorded, but the greater the likelihood that an earlier generation produced a congregation history. Such a document can assist you in deciding what topics are important to your project and can provide starting points for your research. Check the congregation's files or the Unitarian Universalist Association archives.

Divide the research work among the group's members. The personal interests and expertise of researchers will suggest ways to apportion the tasks: one person may be interested in the roles that women's groups have played in the life of the congregation; a youth group may want to consider the history of religious education in the congregation; another researcher may examine the congregation's response to major cultural movements such as abolition, suffrage, or civil rights.

The most common way for dividing a congregation's history is chronological, but the overly rigid application of this structure is dangerous. For example, instead of dividing a seventy-five year history into three parts of twenty-five years each, it might be better to divide the parts by a major event (perhaps the settlement of a new minister or the move from one congregational building to another). In this example, it is more effective to have parts that are internally cohesive and logically divided than to have three parts of equal length.

Doing the Research

After deciding how the research work is to be divided, you can begin to collect the pertinent facts for your congregation's history. This information can be found in a variety of places.

Check all congregation records held by the congregation. Start by sketching the broad outline of the congregation's history: When was it founded? Was it the first congregation in that location or were there others before it? Who have been its ministers? Has it always been located at its present address? in its present building?

Move on to more specific congregation records (perhaps with the assistance of the congregation's secretary and treasurer). The minutes of meetings can reveal a great deal about the problems facing the congregation. Treasurer's reports can chronicle the highs and lows of the congregation's history and can show what the congregation considered important enough to spend money on. By examining endowment records, you may also discover important benefactors whose names have been forgotten.

Visit your local library and historical society to enlist the aid of their librarians. These collections may include local histories that refer to your congregation or an earlier congregation history. Local newspapers are also an important source of information. The library's photograph collection may contain photos of an old congregation building that no longer exists, former ministers, or the founders of the congregation.

Explore the congregation's building for lost or forgotten materials. An old trunk in the attic or a dusty box of books in the basement might yield a wealth of materials to examine. Also pay attention to the memorial objects in the building: There may be interesting stories behind who donated the objects and why.

Don't forget to use human resources by spreading word of your research among the members of the congregation. Older congregation members should be asked to share their memories of the congregation; these reminiscences can lead to other avenues of research. Longtime congregants may have interesting photographs and other memorabilia associated with the congregation that can be included in your history.

Further Research

Based upon what you discover in your congregation records, local library, and historical society, and in interviews with congregation members, you may wish to extend your research. Here are some ways to do so.

Contact the UUA Public Information Office and ask how to initiate a search of the archives there. Among these archives are congregation files (including correspondence, clippings, and photos); old directories and yearbooks; and information on worship services. It is not uncommon for these files to include material that individual societies may have misplaced over the years or lost through accident (fires, floods, etc.) If you are in the Boston area, you may be able to arrange to browse through these files yourself; but call at least one week in

advance to make an appointment. If not, you can initiate a search by the Unitarian Universalist Association's archival researcher.

The Public Information Office can also arrange for a search of the extensive Unitarian Universalist Association archives held at the Andover Harvard Theological Library in Cambridge, Massachusetts. These resources include files on Unitarian and Universalist ministers; files on individual congregations, deceased ministers, institutional directories and yearbooks; a large collection of photographs; the minutes of various general conventions and assemblies; back issues of the major denominational newspapers (e.g., *Christian Register* and *Universalist Leader*); smaller regional publications, and many other sources of information. There is a charge for archival research done at Harvard and the process can take several weeks.

Other repositories of archival materials are the Meadville/Lombard Theological School in Chicago (after Andover Harvard, the second largest depository of Unitarian Universalist archival materials and the site of the Western Unitarian Conference papers), and the Starr King School for the Ministry in Berkeley, CA. If circumstances permit, you may examine these archives in person; if you send a written request for information, try to make your questions as specific as possible.

Writing the History

After the bulk of the research has been completed, begin to write a draft of your congregation's history. The first step is to hold a meeting where the individuals and groups that have conducted research can present their findings and discuss its significance. Your written history cannot include every detail you have uncovered, so the group must decide which facts are most relevant and significant. You may discover information that is not pleasant: It is just as important to document a scandal or a controversy as it is to chronicle a success. Involve as many people as possible in this discussion to ensure that the finished history reflects the diversity of your congregation.

There are two ways to accomplish the actual writing of your history. The group may want to choose one person to do the writing, especially if that person is experienced. The benefits of a single author (stylistic consistency and less repetition) must be weighed against the fact that this task is time-consuming for one person.

As an alternative to a single writer, the coordinating committee may assign different chapters to different authors based on their interests and expertise (in the same way that the work of research was divided). This method may result in a history that is not quite as polished as one by a single author, but one that better reflects the diverse interests of the group. Whichever method you choose, initial drafts of the history must be discussed before a final version is approved by the group.

Publishing Your History Present your written history in the most attractive way possible. In the past this meant sending your manuscript to a printer, but today impressive results can be achieved through desktop publishing. This method will also facilitate the storage and dissemination of your work.

After the history of your local congregation is printed, send copies to the local library, historical society, and the Unitarian Universalist Association headquarters. Copies should also be sent to Unitarian Universalist Association archival repositories mentioned above. Plan to hold a publishing party for the entire congregation to celebrate the completion of your work. The many hours of labor required to produce the written history of your congregation bears fruit only when the history is shared by others.



ARCHIVES

KEEPING LOCAL CONGREGATIONAL RECORDS

About This Brochure

During the recording of material for the Unitarian Universalist Archival Records Survey, many people requested information on how to organize and care for their society's records.

This brochure sets out, very briefly, why we keep local congregational records, how to set up church or fellowship archives, what records to keep and for how long, and what physical conditions are necessary to ensure the safety of the records.

Unlike most of the major denominations in Canada, Unitarian Universalists have no central or regional archives to collect and store material from the local congregations; consequently the responsibility for preserving our heritage rests with each individual society.

The Importance of Local Records

Our records are our history. Unitarians and Universalists have made a contribution to Canadian life which is out of proportion to their numbers. If we want to pass on this heritage to our children and provide to scholars the primary research material for Canadian social and religious history, then we must actively care for our records.

The Guide to Unitarian and Universalist Archival Records will tell scholars and researchers what

material is available and where it is located. Each society will continue to control access to the records in its keeping. You are encouraged to establish the guidelines and record management procedures, as outlined in this brochure, that are necessary to allow responsible researchers to use your records.

If your society has deposited records with local provincial or community archives, then professional advice is available to you

there. If you have other questions regarding local record keeping after reading this brochure, please contact the Project Archivist for the UU Records Survey, Heather Watts, 19 Wyndrock Drive, Halifax, Nova Scotia, B3P 1R8.

Getting Started

1. Appoint a member of your group as Archivist or Historian. This should be a long-term appointment so the person can become familiar with your material.
2. Have your board set up a simple records management policy for the Archivist to follow.
3. Carefully select the place where the records will be stored. It is important that they remain there, and not be passed from board member to board member.

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Prepared for the Canadian Unitarian & Universalist Archival Records Survey, 1989

Special Thanks to Heather Watts
of the HALIFAX, N.S. UU CONGREGATION

What Are The Archivist's Duties?

The Archivist collects, arranges and stores safely the **current, inactive and historical or archival** records of the society. The Archivist can arrange displays, give talks, provide historical information for anniversaries, new member nights, articles and brochures. In larger societies genealogists and local historians may contact the Archivist for information on individual members, local events with which the society may have been associated, or buildings which it has owned or occupied.

At the end of each church year the Archivist should collect the year's **current records** from the outgoing President, Secretary and Committee Chairpersons, weed out duplicates and material without permanent value, arrange and store them as **inactive files**. A

yearly update on the records should be prepared for the board. At the end of the period your board designates for inactive storage (six years in the case of financial records, as required by the federal government) you should weed them again before placing them in permanent **archival storage**.

What Records Should We Keep?

This will depend partly on the space you have available and the amount of time you have to document the history of your society.

At the very least you should keep:

- Legal documents (deeds, constitution, bylaws)
- Annual reports and financial statements
- Minutes of board and congregational meetings

- Membership records
- dedication, marriage and funeral records

- A list of Ministers and/or Chaplains

- Financial ledgers and journals

(other financial records for 6 years)

For a full picture of your society you should also keep:

- important correspondence

- newsletters

- orders of service

- copies of important sermons or talks

- records of church groups (women's group, choir etc.)

- a history of your society

- records of committees of the board (such as religious education and social responsibility)

- scrapbooks and identified photographs

- film, sound and video recordings

- biographical material on ministers and prominent members

- property records and architectural plans

What Records Are Not Necessary For Congregational Archives?

At least three persons (the Minister, the President and the Archivist) should have read these guidelines or taken professional advice and should agree before any records are destroyed.

- Records which are created by the CUC, the UUA and your district office: minutes of the CUC Annual Meetings and records of General Assembly for example. Keep correspondence between your society and these groups.

- Denominational periodicals, unless you have the room and want to

store complete sets.

- Educational materials produced by the CUC, the UUA and the district.

- Invoices, bank statements, cancelled cheques and cheque stubs, records of the yearly financial canvass. Keep financial records in inactive storage for six years.

- Duplicates of congregational materials.

- Stencils.

What Do We Do First?

Assess what you have. Sort your material into the categories listed previously. Be sure you have the material recorded for the Archival Record Survey and that it is accessible.

Arrange your material chronologically where possible. Identify and label everything but do not write directly on documents and photographs. People respect a labelled box or file and are less likely to throw it out by mistake.

Remove staples, paper clips, and elastic bands from your records. Never use scotch tape, rubber cement or glue for mending. All of these will deteriorate and damage the paper. If you need to tie bundles of files together use cloth tape. Modern newsprint deteriorates rapidly because of its high acid content so photocopy all newspaper clippings onto good quality paper before filing.

What Do We Store The Records In?

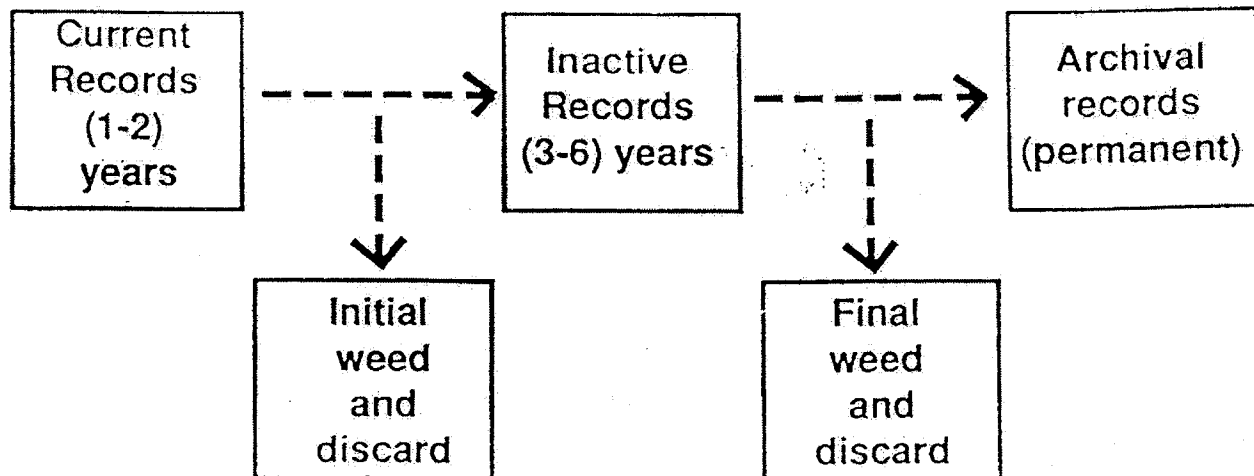
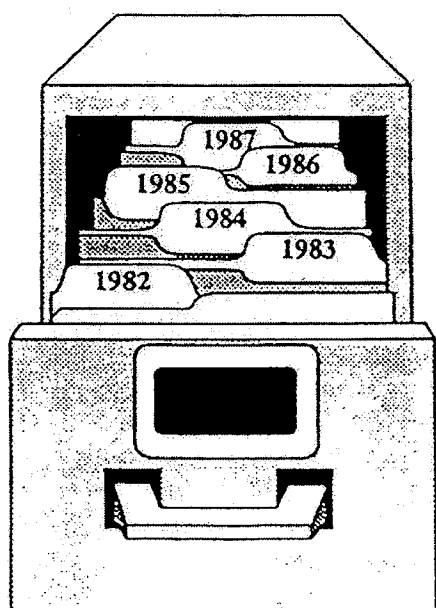
Acid-free containers, envelopes and files are the best storage materials, but they are expensive. As your budget permits you may want to acquire acid-free envelopes or mylar sleeves for your oldest and most valuable items. These are available from library and archival suppliers like:

Carr McLean
461 Horner Avenue
Toronto, Ontario
M8W 4X2

phone toll free
1-800-268-2138

Use archival quality plastic album pages for photographs. Good photography stores now carry these. The popular sticky-page albums will eventually damage the prints. If you are going to keep a scrapbook invest in an album with acid-free paper and use archivally acceptable adhesives. If you have old scrapbooks in your collection don't take them apart, but interleave the pages with acid-free tissue paper to slow the inevitable deterioration.

A metal file cabinet gives good protection to your records, or they can be loosely packed, vertically, in covered cardboard boxes, suitably labelled, and stored on metal shelving.



Where Do We Store The Records?

The safest storage for church and fellowship archival records is in local or provincial archives under professional supervision. Many of our societies have already made arrangements for the regular deposit of their archival records. You should only consider permanent storage within the society if you can afford to ensure that professional standards of climate and light control, storage and supervised access are met.

The current and inactive records that will continue to be kept either in the church or fellowship building, or by individual officers if there is no building, need to be protected from the following hazards:

Enthusiastic Housecleaning: Appointment of an official archivist and adoption of simple records management guidelines will protect the records from loss and destruction by persons with the best intentions.

Heat and Dampness: Records should not be stored in attics, basements or anywhere there are extreme changes of humidity and

temperature. Comfortable room temperature is best. Boxes should be stored off the floor.

Light is damaging to records. The containers you use should be covered or closed, but not airtight.

How Should Access To The Records Be Provided?

Your record management guidelines should state how persons wishing to use your records should apply. Such requests should be made in writing to the Board, stating how the information extracted will be used.

If you have confidential or sensitive material these files should be stored separately. They can be closed to researchers for any specified length of time to avoid embarrassment or distress to living persons.

Records should never be removed from the building

where they are stored or loaned to researchers, no matter how reputable.

Researchers should be supervised while they are using your records. No food or drink should be permitted in the room and notes should be taken in pencil to avoid damage to the documents.

Photocopying of material should be controlled because of potential damage to book bindings from handling and to documents from bright light and heat.

Remember; It is important that a minimum of three members, preferably the Minister, the President and the Archivist, but alternatively a group of past presidents, should have read these guidelines and should agree before any material is discarded.

"Of all national assets archives are the most precious; they are the gift of one generation to another and the extent of our care of them marks the extent of our civilization."

**—Sir Arthur Doughty
Dominion archivist**

Common memories – common hope: help and inspiration for the local church archivist/historian

By Tracey Z. Poole, M.A. '95

At first glance, the task of the church historian/archivist may appear overwhelming, daunting, and yes – even boring. Depending on how well the role has been handled in the past, you may have closets full of musty, disorganized papers to weed through, dozens of unidentified items to catalog and boxes of yellowed photos to attempt to identify.

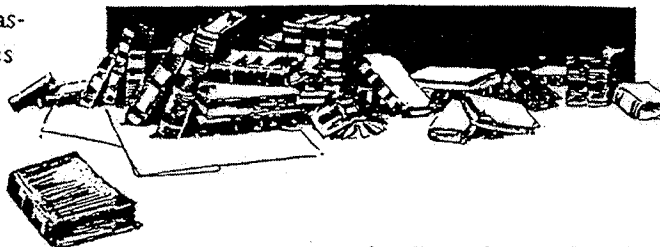
Do not despair! You have been charged with one of the most vital and exciting tasks of any member of your congregation. According to Hal Worthley, head librarian of the Congregational Library in Boston, "the church historian needs a sense of commitment to the idea that this church has made an important contribution locally and nationally to our history and spiritual health." The other piece of good news: lots of help is available to you.

Worthley, who holds a doctorate in American religion and has done course work in archival and library work at Simmons College, has been at the Congregational Christian Historical Society for 25 years, assisting approximately 500 churches and numerous individuals from throughout the country of all denominational backgrounds each year.

Worthley leads a day-long "Suitcase Seminar" through the Massachusetts Conference, United Church of Christ, titled "The Church Historian/Archivist and the Local Church." He is also available for individual telephone and occasional in-person consultation and assistance on any matters related to the task of the church historian/archivist.

The American Baptist His-

torical Society of Massachusetts provides similar assistance to Baptist churches in the state and makes available to its members a pamphlet titled "A Manual for Preservation of Historical Documents," published in 1999. Chester



appropriate funding, the work will not be respected and little can be accomplished.

"Where there are not common memories, there cannot be common hopes." — Anonymous

"Look to the rock from which you were hewn, and to the quarry from which you were dug." — Isaiah 51:1 (NRSV)

"From time immemorial, there have been men and women whose talent or assignment (or happily, both) it has been to preserve and tell stories of the events and personalities of yesteryear, so that by recalling its heritage, the community might recapture its vision and renew its hope and strength."

— Hal Worthley

Smith, the organization's president, has a list of several people who are "ready, willing, and available" to help any local church historian/archivist in need of assistance.

Taking a "live course" on this topic is highly recommended; check your denomination's regional or national offices to see if historian "how to" courses are offered. While space limitations make it possible only to touch the surface of this important topic here, the following tips from Worthley's "Suitcase Seminar" are vital:

- Maintain a modest annual budget for the purchase of preservation supplies. The cost of maintaining the church's records and memorabilia need not be high, but unless the task is given status and

- Identify and organize records, eliminating anything that need not be kept and arranging the "keepers" into some rational arrangement. Sort them according to type and then according to date. Establish a simple register. Headings might fall into the following pattern: Column 1 – Accession Number = 1999-hyphen-4," meaning the fourth item received in 1999; Column 2 – Date received (by you) – "April 29, 1999"; Column 3 – Description – "Records, Christian Ed Committee, 1975-1988"; Column 4 – Donor – "Ann Smith, Christian Ed Chair"; Column 5 – Quantity – "3 loose-leaf binders, 9 x 12 inches"; Column 6 – Location – "Records Storage Closet, Shelf 4."

(Continued, next page)

- When preserving records, avoid heat, moisture, staples and pins, glue, cellophane tape and plastic wrappings. Store records away from light at a constant temperature and relative humidity. Store legal documents in a safe deposit box. Microfilm your church's records; this can cost less than \$600 and both the Congregational Library and the American Baptist Historical Society provide this service. Store records in acid-free containers and avoid all adhesive tapes, rubber cement and rubber bands.

Newspaper clips should be photocopied on acid-free paper and filed in acid-free envelopes. Black-and-white film should be used whenever possible (it keeps better); negatives keep better than positives. Store photos in albums with acid-free pages. Transfer audio tapes to a polyester tape (Mylar), use maximum 60-minute tapes, and plan to copy your older tapes on a 10-to-12-year basis.

- The archivist/historian should be prepared to do the following: read any histories of the local church

and scan surviving records; know broad outlines of the history of your denomination; be familiar with historical agencies of the denomination; be sure the church library includes copies of reliable histories of the denomination; if local church histories have been published, make sure they are available; keep a journal of major church news and activities throughout the current year; report annually to the congregation so people know the care being given to their records.

- If your church is about to celebrate a major anniversary, establish a planning committee 18-24 months prior to the anniversary year. The most common request the Congregational Christian Historical Society receives from local churches is for help with their anniversaries.

The Society will happily provide the following: biographical data on ministers; statistics on the church's development from the early 1800s to the present; sample anniversary year programs, liturgies, litanies, etc.; copies of sermons and musical selections used in a certain period of history; examples of local church

histories and pictorial directories; and advice to the church archivist/historian on the preservation of church records. Andover Newton's Trask Library Special Collections staff offers this same service to American Baptist Churches.

- If your church plans to publish and/or update its history, figure your financing carefully in advance and determine what kind of losses you can handle. Remember that the audience will be mainly your past and present members. To get the best printing service, use local companies which offer you more control over the final product. Highlight the "apostolic succession of congregations – the people gathered," not just the succession of ministers and meeting houses, as written histories often do.

Rather than bemoan the fact that you may have been given the dubious honor of serving as your church's archivist/historian, remember that "you have been called to be keepers of a particular people's past – that their present may be informed, their future enlivened." So go to it, take advantage of the help available to you, and enjoy!

A note of explanation – in most local churches, the functions of the archivist and the historian are joined in a single office held by one person. For the purposes of this article, we have used the term historian/archivist. The functions are, however, quite different. The local church archivist is responsible for collecting, arranging and seeing to the physical preservation and safe storage of the non-current records of the local church. The local church historian shares these concerns as a consultant or resource person and is responsible for marshalling the church's records to document and illuminate the church's past.

Help for Church Historians/Archivists

Books

The Work of the Church Clerk – published by ABHS, includes a chapter on record keeping – available through Judson Press

Memory and Ministry: Caring For Your Church Heritage – A 30-minute video available through EcuFilm for \$14.95; (800) 251-4901

Organizations

The Congregational Christian Historical Society and the Congregational Library
14 Beacon St., Boston, MA 02108
Head Librarian: Hal Worthley
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KEEPING CONGREGATIONAL ARCHIVES
Bruce C. Harding, Certified Archivist
PNW District - UUA Committee on Archives Member

THE IMPORTANCE OF LOCAL RECORDS

Our records are our history! Unitarians and Universalists have made a contribution to American life that is out of proportion to their numbers. If we want to pass on this heritage to our members and provide scholars primary research material for social and religious history, then we must actively care for our records. Preparing a *Guide to Unitarian and Universalist Archival Records* in each district will tell scholars and researchers what material is available and where it is located. Each district or local congregation must continue to control access to the records in its keeping. However, church offices/archives are encouraged to establish guidelines and record management procedures, as outlined in this Item, that will allow responsible researchers to use your records.

If your society deposits records in a nearby professional archive, which is recommended, then advice is available to you. Many PNW professional archives have facilities and staff to accept your congregation's historical records and service them. Arrange to meet the person who supervises an archive in your area and negotiate an agreement for the deposit and/or reference of your records.

GETTING STARTED

1. If a congregation is going to maintain these important records themselves, then they must appoint a member as Archivist or Historian. This should be a long term appointment so the person can become familiar with the material.
2. Have your Board set up a simple archives management policy for the congregation to follow.
3. Carefully select the place where inactive records will be stored. It is important that they remain there, and not be passed from board member to board member as changes occur. This

follows the "birth to death" concept of records management: 1. active life in the office (2 - 5 years); 2. placed in an accessible reference area (2-5 years), and 3. transfer to the archives (permanent) or destroy (heaven and/or hell).

WHAT ARE THE ARCHIVISTS DUTIES

The Archivist selects, arranges and safely stores the inactive and historical or archival records of the society. He/She can arrange displays, give talks, provide historical information for anniversaries, new member orientations and prepare articles and brochures. In larger Societies genealogists and local historians may contact the Archivist for information on individual members, local events with which the society may have been associated, or buildings that it has owned or occupied. Some may conduct video/oral history tape interview projects.

At the end of each year or two, the Archivist must collect the inactive records from the President, Secretary and Committee Chairpersons, weed out duplicates and material without permanent value, arrange and store them as inactive files. An update on the records should be prepared for the Board at the end of the period the Board designates for keeping inactive records (purgatory). You should weed them again before placing them in a permanent archival depository (heaven), or destroy them (hell). He/She is the St. Peter of records!

WHAT RECORDS SHOULD WE KEEP?

This will depend partly on the available space you have, and the amount of time and staff you have to document the history of your society. Basic records consist of the following.

- Legal documents (deeds, constitution, bylaws and contracts).

- Annual reports and financial statements.

- Membership records (dedication, marriage and death records).

- A list of ministers and officers by year.

- Invoices, bank statements, cancelled checks and check stubs, records of the yearly financial canvass. Keep these records for seven years after audit.

Duplicates of congregational published items should be discarded as they are outdated.

WHAT RECORDS ARE NOT NECESSARY FOR CONGREGATIONAL ARCHIVES?

At least three persons (the Minister, the Board President and the Archivist) should have read these guidelines, and taken professional workshops before any records are destroyed. Consider the following for disposal every 2-5 years:

Publications created by the UUA and the PNWD.

Minutes of the UUA Annual Meeting and records of General Assembly.

Denominational periodicals, unless you have room for complete sets.

Educational materials produced by the UUA and the PNWD unless you have space take them apart, but interleave the pages with acid-free tissue paper to slow the inevitable deterioration, or copy on archival sheets.

A metal file cabinet gives good protection to your records, or they can be loosely packed, vertically, in archival quality cardboard boxes, suitably labeled, and stored on metal shelving.

WHAT DO WE DO FIRST?

Inventory what you have by using a form for that purpose. (See last page)

Arrange your material by file title and/or chronologically whenever possible. Identify and label everything but do not write directly on documents or photographs. A labeled box or file folder is less likely to be discarded without asking!

Remove staples, paper clips, and elastic bands from your records. Never use scotch tape, rubber cement or glue for mending. All of these will deteriorate and damage the paper. If you need to tie bundles of files together use archival cloth strips. Modern newsprint deteriorates rapidly because of its high acid content so photocopy all newspaper clippings onto archival quality paper before filing. Do not paste into scrapbook!

WHAT TO STORE THE RECORDS IN?

Acid-free containers, envelopes and file folders are the best storage materials, but they are expensive. As your budget permits you may want to acquire acid-free envelopes or mylar sleeves for your oldest and most valuable items. These are available from library and archival suppliers and you may combine an order with congregations or others in the area to obtain a discount. Inquire at your nearby state/university archives.

Use archival quality album pages for photographs. Good photography stores now carry these. The popular sticky-page albums will eventually damage the prints. If you are going to keep a scrapbook, invest in an album with acid-free paper and use archival acceptable adhesives. If you have old scrapbooks in your collection don't destroy them-possibly copying them on acid free paper or on microfilm.

Financial ledgers, journals, and audits of same.

For a full picture of your society you should also keep:

Correspondence of minister, officers and committees dealing with policy or actions taken by them. These are church records and not personal property of the individuals

Newsletters.

Orders of service.

Copies of sermons or talks (tapes should be transcribed). Records of congregational member groups.

A history of your society (updated each 10 year period).

Records of committees of the board (such as religious education and social responsibility).

Identified negatives and/or photographs.

Film, sound and video recordings.

Biographical material on ministers and prominent members.

Property records and architectural plans.

An index of local media coverage by names of publications, date and page.

WHERE DO WE STORE RECORDS?

The safest storage for congregational archival records is in a nearby facility which is under professional supervision. Some of our societies have already made arrangements for the regular deposit of their archival records. You should only consider permanent storage within the society if you can afford to meet professional standards of temperature (65' - 70°F), humidity (40% - 60%), light control, storage areas free from vermin, water damage, air pollutants and fire possibilities. Also, a paid staff of one or two!

The current and inactive records that will continue to be kept either in the church or fellowship building, or by individual officers if there is no building, need to be protected from the following hazards;

Enthusiastic Housecleaning: Appointment of an official archivist and adoption of simple records management guidelines will protect the records from loss and destruction by persons with the best intentions.

Heat and Dampness: Records should not be stored in attics or basements without climate control or anywhere there are extreme changes of humidity and temperature. Comfortable room temperature is best. Boxes should be stored off the floor! Light is damaging to records over lengthy periods of time. The containers you use should be covered or closed, but not airtight.

HOW SHOULD ACCESS TO THE RECORDS BE PROVIDED?

Your management guidelines should state how persons wishing to use your records should apply. Such requests should be made in writing to the Archivist, stating how the information extracted will be used.

If you have confidential or sensitive material, these files should be stored separately. They can be closed to researchers for any specified length of time to avoid embarrassment or distress to living persons.

Records should never be removed from where they are stored or referenced nor loaned to researchers, no matter how reputable. Copy if needed "off site"

Researchers should be supervised while they are using your records. No food or drink should be permitted in the room and notes should be taken in pencil or on a computer to avoid damage to the documents.

Photocopying of material should be controlled because of potential damage to book bindings from handling and to documents from bright light and heat

Many of the sources given below are available in local or nearby libraries and/or archives. The following publications should be purchased by the PNWD for circulation to congregations.

1. Evans, Frank B., Donald F. Harrison, and Edwin A. Thompson. *A Basic Glossary for Archivists, Manuscript Curators, and Records Managers*. reprinted from the *American Archivist* 37.3 (July 1974).
2. Robek, Mary F., Gerald F. Brown, and Wilmer O Maedke. *Information and Records Management*. 3rd edn. (Mission Hills, CA: Glencoe, 1987-later?).
3. DePew, John N.: *A Library, Media, and Archival Preservation Handbook* (Santa Barbara, CA; AO-CLIO, 1991).

Other sources that could be consulted include the following:

1. Miller, Fredric M.: *Arranging and Describing Archives and Manuscripts* (Chicago: Society of American Archivists, 1990)
2. O'Toole, James M. *Understanding Archives and Manuscripts* (Chicago: Society of American Archivists, 1990).
3. Ritzenthaler, Mary Lynn: *Archives and Manuscripts: Conservation, A Manual on Physical Care and Management* Chicago Society of American Archivists, 1983).
4. Ritzenthaler, Mary Lynn, Gerald J. Munoff, and Margaret S. Long: *Archives and Manuscripts: Administration of Photographic Collections* (Chicago, Society of American Archivists, 1983).

5. Swartzburg, Susan: *Conservation in the Library: A Handbook of Use and Care of Traditional and Nontraditional Material* (Westport: Greenwood Press, 1983).

The following is a brief list of the items which are of value to the archivist-historian and researcher and should be retained in an archives depository. Variations in application will immediately become noticeable when a specific organization is involved. This list suggests rather than prescribes.

1. BOARDS, CONFERENCE AND COMMITTEE MINUTES - These ought to be religiously preserved, especially if the board or committee operates in decision and policy formation areas. Such minutes can be placed on restricted use in the archives depository.
2. CORRESPONDENCE - All official correspondence dealing with policies, functions, personnel, plans and programs of an organization are its property and should be considered for transfer to the archives when "inactive" (4-10 years).
3. REPORTS - All reports issued by executives, boards, or agency personnel or staff members relating to the work or to surveys and activities, plans and projections, including annual reports, should be placed into the archives.
4. FINANCIAL REPORTS - Regardless of form, basic financial reports should be retained. Discrimination can be practiced when an annual financial report supercedes periodic reports and contains identical and/or summary information. Then the annual report will suffice. Lengthy detailed computer printouts may be useless due to the excess numbers they contain and their bulk.
5. HOUSE ORGANS - Newsletters, bulletins, pastoral and executive letters appearing serially, and similar communications are to be filed and considered for transfer to the archives depository after 10 years.
6. POLICY STATEMENTS - Directives and regulations issued by or to executives

and staff or other personnel are archival in nature and transferred to the archives when non-current.

7. PHOTOGRAPHS - Pictures and their negatives, of personnel, executives, boards, buildings, properties, special events, etc. are important, and should be clearly identified and dated. Photographs should be arranged and stored in archival containers for preservation enhancement. Keep photos/negatives in separate areas and or buildings for security.

8. ORDERS OF SERVICE - General and special service items such as installations, funerals, ground-breakings, cornerstone layings, dedications, anniversaries, and other special events should be regularly retained.

9. AUDIO AND VISUAL AIDS - Filmstrips, slides, recordings, record albums, video and oral tapes, and related materials from special events should be preserved.

10. MUSEUM MATERIALS - Items such as worship equipment, appointments and paraphernalia used in the service of the organization, in mission activities, in church and school, etc., may be helpful in depicting the mode of life in exhibits.

11. MISCELLANEOUS - Any documents, manuscripts, ledgers, books, pamphlets, and personal items etc. relating to the work of the organization are also important and should be retained. Personal items of members should be solicited and considered for the archives. The archivist retains the right to dispose of personal items as deemed appropriate.

GUIDELINES FOR CONGREGATIONAL MINUTES

The following are some guidelines for the recording, processing and preserving of the minutes of the congregation's annual meeting, boards, committees and organizations of the congregation.

1. As the official record of the transactions or proceedings of a congregation, as well as of valuable information for future years, the secretary or his/her substitute shall keep a clear, accurate, adequate and objective account of the transactions of any regular or special meetings, including the number of members present at such meetings.
2. To insure accuracy, it is essential that a copy of all recommendations or proposals by congregational boards or committees be given to the voters at the time of their presentation and shall be so entered by the secretary into the minutes with whatever changes the congregation may see fit to make at their adoption.
3. In important business matters, especially those having legal significance, it is essential that the secretary record the names of the individuals moving and seconding the recommendations.
4. In order to provide for permanent legibility, the minutes shall be recorded by the secretary in typewritten form in a durable loose-leaf or post binder or transcribed in a legible hand into a permanent ledger. The binder or ledger shall be furnished and owned by the congregation. After the minutes have been adopted in a subsequent meeting, they shall be signed by the chairman and the secretary before they are filed. Post binders are recommended for such permanent loose-leaf files. A second copy should be kept in another building to provide security from disaster.
5. All letters and documents which come to the secretary in his/her official capacity are considered the property of the congregation and shall be surrendered by the outgoing

secretary or officer to his/her successor.

6. In the interest of safe keeping, the congregation will do well to have the minutes and records reproduced and have the original copies of the minutes stored in a separate place, such as the district archives.

The congregational archivist should present these guidelines to the voters and all boards, committees and organizations of the congregation so that they might be carefully followed. In this way an accurate record of the activities and policies of the congregation will be preserved.

RECOMMENDATIONS ON STARTING AN ARCHIVES PROGRAM

1. Option A. (recommended)

A. Appoint an archivist/historian who will assure that the activities of the unit are fully documented and preserved.

1. Creation/Organization materials

a. Minutes: correspondence: member list: and other data on 'when; why; who and how;: the organization came to be.

b. Drafts: and/or first governing documents, officers elected, all documentation on the unit's activities, such as video/audio tape recordings of speeches., photographs of members., meetings and places used for meetings; newsletters, clippings and/or any printed items on the unit's functions.

2. Basic documents include all policy correspondence: publications, meeting notes / minutes; and fiscal records of a summary nature. Toss checks: receipts: etc., when they are entered into a journal or fiscal report and audited.

B. Obtain equipment and space to keep all documentation until after an annual audit or until entered into a computer system with a duplicate back up (i.e. disc. tape) or microfilmed.

c. Negotiate an agreement with local: state or regional archives which will assist in doing an inventory; selection and agree to accept items for deposit and reference: those records of administrative. legal: fiscal display and/or research value.

D. Assist the archival depository selected to process: shelve and prepare a 'finding' that tells what is deposited, its location and how to access it for use.

E. A library of related non-unit records could be established, too. Books, magazines,

tapes, etc.

II. Option B

If possible, negotiate an agreement with a local, state, or regional archival institution for it to provide necessary procedures for the establishment and operation of a unit records management system and archival program for a fee.

III. Option C

If unable to do Option A or B, accumulate everything possible of the unit's creation, organization, and operations. Box them carefully and store in a suitable environment (60-80 degrees F.), 40% - 60% humidity, no vermin, flooding, or theft).

Comments and questions on these suggestions should be sent to PNW-UUA headquarters and/or to Bruce Harding, 1105 NE Myrtle St., Pullman WA 99163-3801. Ph. 509-332-7749.

Shared Ministry

Ministry Description

Name of Ministry

Church Historian

Purpose of Position

The Church Historian shall be responsible for maintaining a comprehensive record of the development of the church and working with the Minister, staff, and congregation to educate members and friends about the history of The First Unitarian Universalist Society of Marietta and its precursors as well as the history of the Unitarian Universalist movement.

Responsibilities

1. Keep a permanent file of material on important events in the church and the U.U. movement.
2. Enforce an archival policy and procedures developed in consultation with the Minister and History Committee and approved by the Board of Trustees
3. Undertake research to make the archives as full as possible
4. Act as a resource to respond to inquiries concerning the history and historic personalities associated with this congregation.
5. Inform the congregation of historical findings, including regular articles in the monthly newsletter, periodic, and permanent displays.
6. Through consultation with the minister, and the History Committee, develop and maintain periodic and permanent historic displays in the church.
7. Recommend to the Board of Trustees and to the Minister appropriate commemorative occasions and measures to preserve archival material.
8. Submit annually:
 - A. Annual report (due in March)
 - B. Annual budget proposal in consultation of the History Committee (due in August)
 - C. Annual plan of relevant celebrations and displays for the fiscal year in consultation with the minister and History Committee (due in August).

Qualifications

1. Knowledge of/or willingness to learn archival policies, procedures, organization, maintenance and techniques to preserve archival material.
2. Commitment to the mission of this congregation.
3. Enthusiasm for the history of this congregation and the Unitarian Universalist movement in general.
4. Good organizational skills
5. Ability to work as a team member