

THE ARCHIVES OF THE EPISCOPAL CHURCH

Triennial Report of the Archives Interim Director

Summary of Work

The 2021-2023 triennium was a period of transition for the Archives. In 2021, while much of the Church was still working remotely due to the COVID-19 Pandemic, the Archives moved from its long-term home at the Seminary of the Southwest in Austin, Texas to a new, albeit temporary, location at 107 Denson Drive, Austin, Texas. In 2022, the Canonical Archivist and Director, Mark Duffy, retired following a 30-year career defined by his unwavering leadership of and vision for The Archives of the Episcopal Church. The Archives saw the departure of three full-time curators and multiple part-time staff; with the retirement of Records Manager Corrinne Collett being felt particularly strongly.

Despite these difficult circumstances, the Archives staff has risen to the occasion. In November 2021, Amy Evenson assumed the role of Archivist for Institutional Research and Public Services. Having joined the Archives staff in a part-time role to assist with the move, Amy quickly established her value. Armed with a Masters in History and a background in communications and marketing, Amy has been shepherding an unprecedented amount of legal research with professionalism, accuracy, and efficiency.

In January 2022, Sarah Sauri shifted seamlessly into the role of Collections Manager, having previously been the Archivist Assistant to that role for 6 years. Sarah's familiarity with the Archives' procedures, documentation, and collections allowed her to immediately jump into the fray, completing an in-depth audit of the entire Archives' holdings, overseeing the migration of approximately 1,200 cubic feet from offsite storage, as well as overseeing the creation of a public-facing catalog.

In June of 2023, after an extensive search, Carlinthia Cox was hired to fill the long vacant Records Management position. Carlinthia's prior experience in a religious not-for-profit archives program along with her professional archives network has helped to bring a fresh perspective to the Records Management department.

Archivist Retirement

In January of 2022 came the announcement of Mark Duffy's retirement effective March 31, 2022 after almost 30 years as Canonical Archivist and Director. During the first quarter of the year, Mark worked with the Archives staff to close out a number of projects and to prioritize future work of the Archives. Members of the Executive Committee of the Board of Archives, along with former Board Chair, Bishop Neil Alexander, were on hand on Mark's final day, to thank him and honor his service. The Board

unanimously agreed to name the Archives Reading Room in Mark's honor and to bestow upon him the title of Archivist Emeritus.

The administrative responsibilities of the Canonical Archivist and Director were taken up by the Administrative Deputy, David E. Hales. The staff and archival management was transferred to the Digital Archivist, Whitney Hughes.

Interim Director

By mid-2022 a candidate for the position of Interim Director had been identified and vetted. Unfortunately, that candidate removed themselves from the process citing personal reasons. The filling of that position was not actively pursued until it was suggested in late summer that Whitney Hughes, incumbent Digital Archivist, should be asked to submit her resume. Whitney assumed the role of Interim Director on November 1, 2022 coupled with her continuing duties as Digital Archivist.

Research Services

The Research Services of the Archives continues to be in high demand, as archivists responded to 1,302 research queries from 2021-2023. The Records Management Office responded to 24 research inquiries from Episcopal Church Center staff for requests involving contemporary records. Consultations to dioceses, parishes and other church agencies on archiving, records retention, digital archives and related matters accounted for 114 requests. Overall, the Archives staff responded to 1,440 requests for information and assistance during the three years from 2021-2023.

While the number of requests are lower than previous triennia, the decrease is predictable for a variety of reasons. The limited access to the Archives' holdings due to the pandemic and the closure of the Archives Research Office in Austin from April to September of 2021 for the Archives move greatly diminished the total number of requests. The inclusion of new resources on the Archives' website, such as the *Clerical Directories*, *The Spirit of Missions*, and the *Witness*, resulted in an increased usage of the Archives online offerings without interaction with staff. Additionally, the unusual 2022 General Convention resulted in delayed appointments to interim bodies, which has limited the number of internal requests from church bodies. The continued remote work of ECC staff, coupled with the retirement of our long-term Records Manager in 2021, resulted in low requests through that office, with most of the serviced requests being deemed essential to the continuity of business of the DFMS. The departure of Mark Duffy, a prevalent voice in the archives community, also likely affected the number of consultations requested.

Institutional Research

Institutional research covers any request from the DFMS; including the General Convention, Executive Council, and interim bodies; official Episcopal Church agencies, and dioceses and parishes. These users have been in decline in recent years, peaking in 2020 at 38% before dropping to 20% in 2022. It remains to be seen if this decline is a temporary response to the pandemic and a delayed 2022 Convention, or part of a long-term trend. Despite the drop in requests, these requests still account for the majority of time spent by the archivist doing in depth research. Historically these requests would result in a formal research report, although the current trend is moving away from formal reports (down to 24 formal reports for 2021-2023), and towards information that can be returned quickly to the requestor. Research reports do not include the ongoing legal research, which included 1,397 staff hours of research for legislation around Title IV issues, 39 inquiries into the history of individual trust funds, or 36 copyright/permissions requests. Additionally, 335 research reports were prepared for the legislative committees in advanced of the 2022 General Convention.

The following partial list documents the range of topics researched for the DFMS, General Convention, and interim bodies.

- History of the Episcopal Church in Micronesia and Guam
- The Episcopal Church in Liberia
- TEC Property Holdings in Honduras
- Ecclesiastical Authority in Non-Diocesan Designated Areas
- History of the Office of the Historiographer
- Insignia for House of Deputies
- Origins and Role of the Human Resource Committee of the Executive Council
- Executive Council Shareholder Resolution Terminology
- History of the Executive Council and National Council's BIPOC members
- Insurance Policy Holdings and Documentation
- Trust Fund Legacy Holdings
- Seabury House Trust Fund origins and history for GC 2022-A129
- Episcopal Seminary of the Caribbean Trust Fund origins and history for GC 2022-A129
- Copyright/Access Policies regarding Photography of past DFMS events
- Title IV Proceedings Regarding John Doe Legal Inquiries
- Legal Inquiry for Diocesan Litigation
- Human Resources Manual Holdings Including Safe Church Training

- Ecclesiastical Endorsement Procedure for Chaplains
- Defining the Relationship between the United Thank Offering and the Executive Council
- DFMS Records Retention for Legal Council Inquiry

External Research and Outreach

External research includes Episcopalians who are not engaged in formal work on behalf of the DFMS, or General Convention, as well as non-Episcopalian researchers, typically scholars and historians. Requests by church members saw a steady increase, up from 25% (2018-2020) to 33% (2021-2023). Scholarly requests have remained consistent at approximately 43% over the last three years. These requests often involve directing individuals to the Archives' online resources, but occasionally include large-scale research projects. The vast majority of visiting researchers are non-Episcopalians engaging in high level, academic research. Notably, 2023 saw a return to the pre-pandemic numbers of visiting researchers.

Also significant, many of the researchers are involved in long-term projects and have plans to return to the Archives in the near future. The Archives is currently scheduled out to February of 2024, with a hiatus for onsite research in the months immediately preceding the 2024 General Convention.

The following is a partial list of projects of external researchers supported by the Archives:

- Samuel Shoemaker: Shoemaker's role in the founding of Alcoholics Anonymous
- History of The Episcopal Church's response to the AIDS Crisis
- Alaska Missionary District and The Episcopal Church
- The Episcopal Church in the Confederate States of America and Sewanee's fund raising history
- Samuel Farmar Jarvis: Correspondence regarding American Gothic Revival architecture
- Bishop James Theodore Holly and the Episcopal mission in Haiti
- Okolona College, an HBCU in Chickasaw County Mississippi, history
- LGBTQ+ lay and clergy and their role in the Church
- American Church Institute for Negroes (ACIN) and higher education institutions involvement
- Episcopal Church in Liberia: Cuttington College
- Episcopal Church in Liberia: Early foundations of the Episcopal missions in Liberia
- Episcopal Church in Liberia: The Female Orphan Asylum of Liberia

- Mary Elizabeth Wood and the establishment of the western library system in China
- Philadelphia Eleven Documentary audio and video media support

Digital Archives

The Digital Archives continues to be the main portal through which users receive information from the Archives, with usage increasing from 37% of the web use in 2020 to 51% in 2023. The *Acts of Convention* is the most accessed resource, accounting for 30% of all traffic. New additions to the site, including the *Clerical Directories* and *The Spirit of Missions* have also been successful and will shape how the Archives develops its online offerings in the future.

Acts of Convention, 1973-2022

The Acts of Convention was updated in late 2023, following the publication of the General Convention Journal, to include the 339 official resolutions from the 2022 General Convention. Staff departed from established procedure, pulling data directly from the Legislative Processing System to generate the Acts data, and then comparing the data to the published Journal. This allowed Archives staff to front-load the data processing ahead of the availability of the Journal, a particularly important factor given the shortened triennium and the need to have Acts updated in time for the earlier start of the 81st General Convention.

Reports to General Convention from Official Bodies

The Digital Archivist updated the Reports to General Convention, adding 53 reports of the General Convention Interim Bodies. These reports were submitted in 2020, prior to the postponement of General Convention, and published without subsequent updates in 2021, therefore offering a unique perspective of the Church engaging in business during the pandemic.

Spirit of Missions

In 2022, the Archives staff digitized *The Spirit of Missions*, the official publication of the Board of Missions and the Domestic and Foreign Missionary Society from 1836 until 1939. Although the content and organization of the publication changed throughout its 103 years of publication, it stands as a rich and robust source of information into the missionary work and other social engagements of the Church. Following a positive reception to the addition of selected volumes of *The Spirit of Missions* to the Archives' website, the Archives is in the process of creating a formal digital archive with the complete run of *The Spirit of Missions*, which will include robust keyword searching.

Interim Bodies

In 2022, the Archives began the first steps in making available online the historic minutes of the Church's interim bodies. While currently limited to committee members and staff, the Archives expects this digital archive to grow and become widely accessible with time. It is anticipated that this new resource will include minutes from the Board of Missions (1820-1919), the National Council (1919-1963), Executive Council (1964-present), as well as numerous interim bodies.

Information and Technology Infrastructure

In July of 2023, the DFMS IT Director and the Archives staff initiated a long-term project aiming to integrate Archives technology more fully into that of the DFMS/Episcopal Church Center, allowing for improved stewardship and collaboration in the sharing of resources. During the IT Director's week-long visit to the Archives, short-term goals included: installing a new DFMS-supported firewall, configuring DFMS-supported laptops for flexible, hybrid workflows, configuring an improved WIFI network, and identifying data storage needs. The firewall was setup, providing Archives staff direct access to remote network stores, and will greatly improve the ease of access and data flow for future records retention work by the Records Management Office. While it will take time to fully realize identified long-term goals, the trip was incredibly successful in rebuilding the collaborative relationship between IT and Archives.

Acquisition and Access

Historic records acquisition for the period of 2021 to 2023 amounted to approximate 821 cubic feet of paper records and 8.8 TB of electronic records. Due to the move and the departure of the Director, the Archives has not been actively soliciting historical records from non-DFMS entities. Despite this, many ongoing engagements prior to the Director's retirement came to fruition as we have seen an increase in individual seeking to donate records to the Archives. With the continued work-from-home situation and the departure of the Records Manager in 2021, records received by the Records Management Office diminished greatly with 22 cubic feet of paper records and 260 GB of electronic records received. With the return of staff to ECC in the fall of 2023, and the hiring of Carlinthia Cox as the new Records Manager, we anticipate engaging in an aggressive records retention campaign in the next triennium, particularly focusing on the acquisition of electronic records. The trend of diminishing paper records is expected to continue with perhaps a few cycles before paper records become the exception to the norm.

Between 2022 and 2023, archivists conducted archival appraisal, processing, and description that resulted in 17 formal finding aids, representing 200 cubic feet of fully processed records. Additionally, archivists created inventories for 43 collections, representing 268 cubic feet of archival records.

The following is a partial list of fully processed and minimally processed records:

- Papers of Dr. Charles Radford Lawrence II and Dr. Margaret Lawrence, 14 cu.ft.
- Records of the Episcopal Theological School, 67 cu.ft.
- Records of the Philadelphia Divinity School, 24.4 cu.ft.
- Records of the Association of Anglican Musicians, 5 cu.ft.
- Records of Instituto Pastoral Hispano, 19 cu.ft.
- Office of the Presiding Bishop, 20.7 cu.ft.
- Papers of George Hodges, 12 cu.ft.
- Papers of the Sherman Family, 4.35 cu.ft.
- Papers of Pamela Chinnis, 11.5 cu.ft.
- Pennington-Jarvis Collection, 1.75 cu.ft.
- Papers of Daisuke Kitagawa, 10.15 cu.ft.
- Papers of John Kitagawa, 4.4 cu.ft.
- Papers of Ian Douglas, 11 cu.ft.
- Papers of Sandra McPhee, 3 cu.ft.
- Records of Province VIII, 11 cu.ft.
- Records of the Association of Episcopal Colleges, 12 cu.ft.
- Records of the Diocese of Liberia / Papers of Rt. Rev. George Browne, 15 cu.ft.
- Records of The Archives of the Episcopal Church, 57 cu.ft.
- Records of the Registrar of Conscientious Objectors, 3 cu.ft.
- Records of Venture in Mission, 10 cu.ft.
- Records of National Episcopal Historians and Archivists, 28 cu.ft.
- Historical Society of the Episcopal Church Journals, 12 cu.ft.
- Episcopal Media Center Reels and Records of C.S. Lewis Productions, 14.4 cu.ft.
- Episcopal Church Annuals, 18 cu.ft.

Offsite Storage

In 2022 and 2023 the staff initiated and completed the work of removing approximately 2,000 cubic feet of records from Iron Mountain. This multi-faceted project allowed for reappraisal of records stored

offsite in order to recycle duplicate publications, consolidate poorly housed collections, update existing finding guides, and prepare those records for transfer to a local, more responsive offsite vendor, SafeSite. The move to SafeSite will stabilize offsite storage costs by eliminating service fees imposed by Iron Mountain. The overall monthly storage costs will not decrease, however, there will be a marked increase in the ease of transfer, retrieval, and storage of records with no hidden fees for other services.

Records Center

In 2023, the Records Manager completed a stacks-wide audit of the entire collection, including the primary records center, the small “temporary” records center, and the flat file storage. In response to this audit, the Archives staff transferred 991 cubic feet of records flagged for permanent retention from New York to Austin. Additionally 147 cubic feet of records were destroyed under the records retention schedule and an additional 907 cubic feet of records have been flagged for destruction when the circumstances allow. Much of this work was completed in anticipation of construction to be completed by Building Services in 2024, which necessitated the Archives empty the small records center as well as approximately three aisles of collections at the back of the primary record center.

A New Temporary Home

The Archives took possession of its new home at 107 Denson Drive in April of 2021. The move of the physical collections took an incredible group effort and was not declared complete until late January 2022 once a holdings location audit was accomplished with an approximate 3% error rate corrected. All intellectual controls reflect the current facility and have proven to be accurate with daily use.

Along with getting the holdings placed, audited, and stabilized a number of physical plant challenges had to be addressed over the period of occupancy of the space. The primary concern related to the facility was the repeated encroachment of water through the roof, walls, and windows into the interior of the building. Fortunately, the archival collections were not negatively affected, and in late fall of 2022, work began on the installation of a new roof, with cost borne by the landlord. The new roof, the sealing, and painting of the exterior wall, and the installation of the awning have taken care of all the leaks that were experienced for the first two years of our tenancy in the building. Large exposed windows in the Reading Room, Staff Room, Work Room and the Director’s Office required purchase and professional installation of window treatments to mitigate heat and UV damage in these spaces. That was accomplished in mid-2023 and has made a marked difference in those spaces. A further pressing need and goal achieved in 2023 was the replacement of sub-par office furniture that was having a negative affect on the health and well-being of the staff.

While the Denson facility is an improvement over the previous situation, the Archives staff are aware that this is a temporary home that does not meet the Archives’ needs and is not capable of holding the entire collection, which is currently housed among 4 locations. The acquisition of materials is always conducted with an eye towards available space and resources; as once a donation is accepted, the

Archivist has a professional duty to uphold the trust place in us to provide for the permanent housing, preservation, safekeeping, and access to the materials. For the first time, the Archives was unsuccessful in a significant acquisition opportunity due to its uncertain future and physical space. It continues to be of the utmost importance that The Episcopal Church find a permanent home for the Archives that will allow it to fulfill its mission and continue to connect the Church's history with its ongoing ministries.

Acknowledgments

The Archives curatorial and technical support team accomplished a tremendous amount of work in demanding and unconventional circumstances. They met these challenges with a professionalism and grace that defines the very core of this institution. Their dedication to cooperation, and willingness to seek innovative solutions and push the boundaries as information professionals will benefit the Archives and The Episcopal Church for years to come.

Special appreciation goes to Administrative Deputy, David Hales, whose unwavering support and good humor sets the tone for the entire staff. As Research Archivist, Amy Evenson leaned into the demands of modern research in the age of the Internet, educating more than a few along the way. Collections Manager Sarah Sauri managed the many moving parts, and indeed boxes, with accuracy and aplomb. 2021 saw the retirement of Corrinne Collett. During her 14 years of exceptional service as the Records Manager, Corrinne oversaw the development of the records retention program and the Digital Repository. Carlinthia Cox came into the role of Records Manager with a willingness to learn and has adapted to her role with energy and thoughtfulness. We are forever grateful to the following Archives Assistants: Katie Buonanno, Leah Christian, Keely Drummond, Rothko Hauschildt, and Karen Twer and our contracted consultants Rachael Gilg and Patrick Goetz whose expertise and collaboration supports our work in so many ways.

It is impossible, to recognize the good work of the Archives staff without acknowledging the foundation that allows it to thrive. Mark J. Duffy's guidance through 30 formative years in building the collection to reflect the many diverse voices of The Episcopal Church, and to elevate the story of the individual within the identity of the whole cannot be overstated. Mark's full-hearted dedication established this Archives as one of the premier religious archives in the country and one with a reputation of continuing professional excellence and innovation. For Mark's dedication as leader, mentor, and friend, without whom this Archives, nor this Archivist would exist as they do, I am grateful.

Whitney R. Hughes Interim Director November 30, 2023