Overview:

In 2017, All Souls ("AS") moved the bulk of its archival papers to Meadville Lombard Theological School ("MLTS") under a written agreement that promises that AS will send current and future archival materials to MLTS <u>at least every 5 years</u>. The lead archivist at MLTS, John Leeker, is extremely professional and has a great deal of experience and wisdom to provide; it is very much worth consulting with him at length to set-up a system for the current and future transfer of additional materials to MLTS.

Separately from the materials that are deemed to be properly "archival" materials, AS also has a number of other materials related to its life as a congregation that have historical value and potential historical value for the future. These additional materials include:

- Books
- Art
- Artifacts
- Photographs
- Audio and Audio/Visual Recordings (in a variety of formats)

At the present time there are several steps that need to be taken to ensure the ongoing preservation of historically-worthy materials related to AS. Below are some of these steps and some ideas for systems to be created to help this work be sustainably maintained over the future.

Recommended Steps to Be Taken Now:

Archival Materials

Item	Where/How	Who	Specific Notes
Determine Leadership for this project	Was: retired Executive Director, former Communications Director and congregant volunteer Barbara Deakin (who has since had to resign from this volunteer position)	 Suggest there be two individuals assigned: <u>project overseer</u> (Historical Society member / congregant volunteer? Board member or appointee?) and lead staff member 	Make sure Senior Minister and Board Chair understand and agree to scope of totality of this project and to who will be the appropriate lead individuals
Update / Transfer / Correct DropBox Account for Archives	This already exists and is being paid for by AS	Currently associated with Barbara Deakin. Needs to be transferred to new leadership members.	Ask Nadira to research with I.T. By Design: What email addresses are currently associated with this DB account?

Item	Where/How	Who	Specific Notes
 Set up a structure and timeline for: 1. catching up on materials now due to MLTS, and 2. systematizing the collection and transfer of materials to MLTS on a regular basis moving forward 	Separate project #1 into separate sections. Create a separate timeline and leadership structure for project #2		specific rotes
2 boxes of paper materials	In the A&A Attic	Needs a <u>supervised</u> effort to sort through these materials and then digitally copy, save, name, and transfer these materials to MLTS Note: Either a volunteer or a part-time worker (receptionist, temp, etc.) needs to take this project on as a complete one-time project. Very difficult to split this up into piecemeal bits.	Suggestion: project overseer have an extended conversation with John Leeker about setting up a naming convention for the documents – both in this batch AND in the ones below as well – that will facilitate the best transfer of materials to MLTS so that there is minimal confusion and need to re-review and re-label the materials again once they reach MLTS.
Orders of Service from 2012(?) to present	Should be in Rachel's DropBox folders	All of Rachel's DB folders are now accessible by Cecily	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.
Monthly Bulletins from 2012(?) to present	Should be in Rachel's DropBox folders	All of Rachel's DB folders are now accessible by Cecily	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.
Annual Meeting Reports from 2012 to present	Should be in Rachel's DropBox folders	All of Rachel's DB folders are now accessible by Cecily	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.
Posters from 2015 to present	Should be in Rachel's DropBox folders	All of Rachel's DB folders are now accessible by Cecily	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.

Archival Materials (continued)			
Item	Where/How	Who	Specific Notes
Board Minutes from (?) 2015 to present	Should be in Eileen's Audit folders in DropBox. OR: Can ask Carol Kirkman for her copies.	All of Eileen's DB folders are now accessible by Nadira	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.
Finance Committee Minutes	Should be in Eileen's Audit folders in DropBox	All of Eileen's DB folders are now accessible by Nadira	Check with John Leeker as to what date the materials that were transferred to MLTS ended, and start from that date on.
Investment Committee Minutes from 2018 to present	Minutes didn't start being written until 2018, by Melanie Niemiec	Should be in Eileen's Audit folders in DropBox; all of Eileen's DB folders are now accessible by Nadira	
Special publications from 2015 to present, including #BLM/FFC Award Book, Capital Campaign "View Book" and other similar materials	Should be in Rachel's DropBox folders	All of Rachel's DB folders are now accessible by Cecily	
Capital Campaign Materials – Fundraising Related	All paper copies were in a file drawer in Eileen's office that were transferred to Cecily's office in December 2019.	There are also many (but not all) documents in DB folders that were Eileen's, now accessible by Nadira	Check with John Leeker as to what documents are typically helpful and important to save for such types of campaigns. What will be useful for researchers in 50, 100 or 200 years from now?

Archival Materials (continued)			
Item	Where/How	Who	Specific Notes
Capital Campaign Materials – Building Renovation and Restoration Related	All materials are currently held in a special DropBox folder called "BATF" (for Building Advisory Task Force)	The BATF DB folder is currently able to be accessed by Fritz Reuter, Deborah Taylor, Virginia Kindred, and Nadira Shawram- Singh, although Deborah Taylor has been most careful about keeping the many many documents organized. Recommend: Board ask Deborah Taylor to work with Project Overseer and Staff Liaison for this purpose.	This will need a special <u>conversation</u> with Senior Minister, Board Chair and BATF members (with input from John Leeker) to determine how to best "curate" these materials in order to send the most appropriate documents to MLTS but to not send too much that is either redundant or deemed unnecessary.
Current Materials related to COVID-19 Pandemic and on-line programming	Daily emails with schedule. Digital recordings of programs	Cecily should have access to all of these materials.	This will need a special <u>conversation</u> with John Leeker to determine what MLTS would like to receive related to this special time. *** See special notes on p.7 below.

<u>Recommended Steps to Be Taken Now:</u> <u>Art and Artifacts</u>

Item	Where/How	Who	Specific Notes
Fine Art Objects around All Souls	Sanctuary, Ware Room, Chapel, A&A Attic, on walls throughout building	Barbara Reed and Sydney Starr have begun cataloguing these objects and compiling notes about the artists, provenance and significance of these works	A copy of Sydney Starr's book of notes is in digital form in the retired Executive Director's DB folder (labeled "Archives"), accessible by Nadira. An Art & Artifacts "Policy" was created by the Board in 2016, but this is no longer in accordance with the Board's policy governance structure. Recommend a conversation with Board Executive Committee, Carol Kirkman and Senior Minister to strategize next steps for systematizing this catalogue.

Art and Artifacts (continued) **Specific Notes** Where/How Who Item Barbara Reed and Sydney Starr Artifacts around All Items such as: the old cross See comments above. that hung in the Chancel, the have begun cataloguing these Souls sample "string art" piece, etc objects and compiling notes about Recommend: Board ask for a complete the significance of these artifacts items that are physical and of written catalogue of art and artifacts to be historical significance but that compiled by BR and SS. are not, technically, art objects. These items are important and should be e.g. Dick Leonard "two words" Bill Bechman has been taking Other Art and Artifacts tracked but do not rise to the "Fine" Art poster, framed 10 Sr. Minister care of rotating interesting and around AS photos, displays made around beautiful displays of historically level being tracked by BR & SS. lower levels by the "Warden of relevant materials, with the help Recommend: develop some system of the Walls" of the custodial staff, throughout inventory and tracking locations of these the years leading up to the materials. Bicentennial.

Recommended Steps to Be Taken Now:

Books

Item	Where/How	Who	Specific Notes
Books about All Souls or by All Souls Ministers	In Ware Room glass cabinets and in A&A Attic	Barbara Reed and Sydney Starr graciously agreed to sort and catalogue these books (even though they are not, technically, considered art, artifacts or archives)	This process is about 50% or more complete. Suggest being grateful to BR and SS and urging this work to be tied up and completed at the earliest possible juncture. Recommend: Board request a complete catalogue of works at the end of the project.

Recommended Steps to Be Taken Now:

<u>Photographs</u>

Item	Where/How	Who	Specific Notes
At least one large box	In A&A Attic	At some point Lois Coleman	Check with John Leeker – does
(possibly more) of		had agreed to take on the	MLTS really NOT want
photographs	Melinda Beck and Lois	project of cataloguing and	photographs, or was that just a
	Coleman went through the	labeling (and preserving?)	decision made around the initial
	one large box at some	these photographs – but she	transfer of documents.
	length during the	later seemed to have	
	preparation of the	forgotten that conversation.	If MLTS truly does not want these
	Bicentennial book.		materials, it will be important to
			find a way to catalogue and retail
			what historically significant
			photographs All Souls does have.
Digital Photographs	In Rachel's Dropbox	Cecily has access to all of	If MLTS is willing to take digital
	folders: both for the	these folders	photographs, it will likely require a
	Bicentennial book and in		project of curation to decide which
	several other folders		to include and to generate a
			standardized naming convention.

Recommended Steps to Be Taken Now:

Audio and Audio/Visual Recordings (in a variety of formats)

Item	Where/How	Who	Specific Notes
Several shelves of Cassette Tapes, Video Recordings, Beta Tapes, CD's	In A&A Attic	??? This had been another part of what Barbara Deakin had originally agreed to take on (in addition to the updating of the paper "archival" materials to be sent to MLTS on a regular basis). A new volunteer needs to be recruited for these materials.	 This is an area fraught with uncertainty. The events that were recorded were captured at the time because someone believed the particular events would be of historical value at some point in the future. Lorraine Allen was cataloguing what we had up until 2015 – a PDF of her table of contents was made and exists in at least three locations: 1. retired Executive Director's DropBox folder named "Archives" 2. copy given to John Leeker at MLTS 3. copy given to Bill Bechman But, with so many different types of media and the fact that many of these are now obsolete, decisions need to be made to weigh historical value of recorded events against the financial and time resources necessary to get the recordings transferred to usable digital formats that
* * *		This will need a special c	can be safely kept for future use.
Current Materials related to COVID-19 Pandemic and on-line programming	Daily emails with schedule. Digital recordings of programs	It seems that the field of library archival science MUST be being pushed rapidly into the digital 21 st century world. How will current archivists help preserve the materials of the present for scholars of history in the future if the criteria defining what is, technically, "archival" material remains limited to paper documents? How is MLTS preparing to retain the future history of Unitarian Universalism for posterity?	