

HARC Archival Congregation Visit — Records Survey & Visit Guide

Purpose: This guide and survey form help Heritage and Research Center at Saint Mary's (HARC) staff conduct sensitive, efficient, and consistent archival visits to congregations. Goals: assess scope and condition, estimate extent and types, identify urgent or at-risk materials, collect inventories/box lists (if available), and gather contextual information for accessioning, processing, and preservation.

Pre-visit checklist (what to prepare)

Confirm date/time, parking, building access, and points(s) of contact.

Send a brief agenda and purpose statement to the congregation contact beforehand.

Request any existing inventories, box lists, finding aids, or accession lists in advance.

Bring supplies: camera/phone for documentation, measuring tape, sticky notes, index cards, gloves, box-size labels, laptop/tablet, intake forms.

Review any donor agreements in file and note questions about title/ownership.

If digital deposits are expected, confirm transfer method (physical drive or cloud) and available staff to assist.

On-site visit etiquette & sensitivity

Introduce yourself and explain the visit's goals—be clear, concise, and respectful.

Recognize congregational authority and customs; ask permission before handling anything.

Be mindful of privacy and sensitive records (personnel, medical, juvenile, sacramental registers).

Offer clear next steps and timelines so the congregation knows what to expect.

If the congregation requests restrictions or embargoes, note them and explain how those will be recorded in the deed.

Records survey form (to be completed during the visit)

Use the fields below to capture high-level information. Fill what you can; leave detailed inventories for later processing.

A. Congregation & Visit Details

Congregation name:

Location (address/room):

Visit date:

HARC staff present:

Congregation contact(s) present (name/role/phone/email):

Immediate follow-up required? (Y/N). If yes, describe:

B. Administrative history & context

Administrative-history summary or timeline (evolution of provinces/areas, major reorganizations).

Who historically managed records and where were they kept?

Have records ever been transferred to other repositories, museums, or state archives? If so, list them.

Are there known large losses (fires, floods, closures) that produced gaps?

C. Finding aids, inventories & existing documentation

What finding aids, inventories, or indexes exist? (paper lists, Excel, Access, PastPerfect, Archivists' Toolkit, Google Drive, etc.)

Is there a congregation-created box list?

D. Extent & formats (estimate)

Estimates using boxes/items/GB. Use visual cues or rough measurements.

Material type	Estimate/boxes/items/GB)	Condition notes/storage
Correspondence Administrative files		
Photographs Negatives Slides		
Audio recordings Oral histories		
Digital files Drives Cloud storage		
Artifacts Objects		

E. Digital materials (questions to ask)

Do you have digital files to transfer to HARC?

Approximate total size:

(GB / TB)

What file types/formats are present?

How will digital files be transferred?

Are cloud accounts present that need harvesting? (Google Drive, Dropbox, Shared drives)

Are email archives present (Outlook PSTs, MBOX)?

F. Special handling & conservation concerns

Identify materials that need special care during transport (fragile oversized items, photographs, audio/video carriers, film, magnetic tapes, bound volumes with loose bindings).

Are items requiring immediate conservation or rehousing? Note urgency and recommended action.

Record any hazardous materials (mold, pest damage, chemical residues) and do not move without PPE and guidance.

G. Artifacts and three-dimensional objects

Identify artifacts that should be boxed/crated for transport (statues, textiles, liturgical objects)

Note approximate dimensions and weight; can the congregation assist with packing/transport?

Is specialized packing or crate work required?

H. Access, administrative use, & disposal

Are any records still in regular administrative use (property records, wills, current personnel files)?
If yes, which and how often accessed?

Are there other sets of records the congregation wishes to dispose of? (non-archival or duplicates)

Has the congregation created a schedule or calendar for future transfers to HARC?

I. Other repositories & provenance

Has the congregation previously sent records to other archives or museums? List repositories and record types.

Are there external custody agreements or donor restrictions in past transfers?

Are copies of records known to be held elsewhere (e.g., student transcripts)?

J. Gaps & missing history

Are there known gaps in the archives and any oral-memory leads that might fill them (e.g., major events, disasters).

K. Local expert & volunteer knowledge

Congregation contact or volunteer familiar with historical context who can function as a reference during processing.

Name(s) and contact:

L. Shipping & box list notes

Collect any congregation box lists. If HARC hires packing/shipping (e.g., Bradford), note that the vendor will also create a shipping box list — congregation box lists are still valuable for internal processing.

Sample box list columns (collect if available):

Box ID

Contents (brief)

Date range

Notes/condition

M. Immediate safety & legal flags

Are there legal holds, subpoenas, or litigation affecting these records?

Do any records contain sensitive personal data (medical, juvenile, personnel) requiring restricted handling?

Are there infection/mold hazards or safety risks when handling materials?

N. Follow-up actions & next steps (for HARC staff)

Document intake items and produce an initial site-visit summary within **7 business days**.

If accession likely, prepare a draft Deposit Agreement/Deed to review with the congregation.

Log contact names and any promised documentation (box lists, inventories) and set dates for follow-up.

Signature & acknowledgment

HARC staff completing survey:

Date:

Congregation representative:

Date:

Preparing for a HARC Archival Visit

A short checklist to help your congregation prepare for a records survey visit by the Heritage and Research Center.

Designate a point of contact and provide contact details (name, role, phone, email).

Gather any existing inventories, box lists, finding aids, or accession lists and keep them together. If you have a box list, please print or provide an electronic copy for the HARC team when they arrive.

Identify a secure workspace where materials can be brought for review.

Set aside priority collections (minutes, sacramental registers, photographs, administrative files).

Identify fragile or oversized items and note any hazardous materials (mold, pests).

If transferring digital files, note whether they will be provided on an external drive or via cloud.

Expect a short on-site survey and a follow-up summary with next steps and recommendations.

Contact:

Executive Director – bgordon@harcasm.org

Lead Archivist — japryse@harcsn.org