

District Archivist Handbook

Guidelines for LCMS Districts in
Managing the Documentary History
of Your District
and Your District Congregations

Daniel N. Harmelink

2023



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Honoring our Past
Inspiring our Future

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in Managing the Documentary History of Your District
and Your District Congregations. Edited by Daniel N.
Harmelink.**

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The active management of historical records honors the past of Christ's redeeming work among us, informs our identity, and inspires our future under his gracious promises.



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Your dedicated curation of historical records is the foundation upon which the history of the Lord's ministry among us is preserved and proclaimed.

CONTENTS

Introduction	1
1. Establishing a District Archive	3
The Relationship Between the District Archive / District Archivist and Concordia Historical Institute	3
Establishing a Clear District Archive Mission Statement	4
Establishing District Archive Goals and Objectives	5
Establishing and Clarifying the Relationship Between the District and the District Archive/ District Archivist	6
Establishing a Position Description for the District Archivist	7
Providing and Maintaining Appropriate Spaces for the District Archives	10
Optimum Temperature and Humidity	11
Providing and Maintaining Appropriate Archival Resources for the District Archive	11
Making Provisions for a Disaster Recovery Plan	11
2. Setting District Archive Management Policies	13
The Purpose Statement	13
The Scope of the District Archive Collection	13
Setting Criteria for Acquisitions	14
Setting Criteria for Deaccessioning	15
Setting District Archive Access and Use Policies	17
User Access Agreement Form	18
Access to Restricted / Confidential Archival Material Housed in the Collection	21
Donor Receiving Record	25
Index	27



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**Your advocacy of the District Archive
is an essential way to document
the good service your district provides
to the Lord and His Church.**

**Properly archived documents ensure
an accurate paper trail of your district's
faithful service to they Synod, district
congregations and leadership, and the
countless people your district serves.**

Introduction

The responsible keeping of records is the foundation upon which the history of the Lord's ministry among us is preserved and proclaimed.

It is simply good stewardship that requires each LCMS district to be a responsible, diligent manager of documents created and used in the course of doing ministry.

It is essential that the source documents of Christ's activity through your district—be they reports, minutes, correspondence, photographs and video, internet blogs—be actively kept in a way that will make them available to those who serve with us and those who will serve after us.

This handbook is the product of the long partnership between Concordia Historical Institute and district leadership in our mutual objective to “treasure and trumpet the redeeming work of Christ in the life of the Missouri Synod.” To that end, we encourage a continued discussion and welcome any suggestions or additions to future editions of this reference manual.

The Rev. Dr. Daniel N. Harmelink
Executive Director
Concordia Historical Institute



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Curating the historical material of the District demands new partnerships and new ways of efficiently managing a wide variety of historical materials with limited resources.

Establishing a District Archive

The Relationship Between the District Archive/ District Archivist and Concordia Historical Institute

From the very beginning of The Lutheran Church—Missouri Synod over 175 years ago, provisions were made for the management of records and their final disposition. The Secretary of the Missouri Synod was charged not only with the keeping of the church body's records but was also charged with being the synod's Chronicler who would act as Curator to document the history of the LCMS. Responsibilities for maintaining archival materials became a shared responsibility with the creation of districts within the Missouri Synod (1854), the convention recommendation that each LCMS District appoint a District Archivist (1929), and the official designation of Concordia Historical Institute as the official department of archives and history of The Lutheran Church—Missouri Synod (1959).

The specific partnership between each district archive and Concordia Historical Institute is spelled out in the LCMS *Handbook*:

3.6.2.2.1 Concordia Historical Institute shall serve as an advisory and correlating agency for historical interests within the Synod and shall collect and preserve articles of historical value.

- (a) Congregations permanently disbanding (not merging) are urged to transfer all of their records, such as registers of official acts, minutes, and other historical materials, to the institute.**
- (b) All records created by officers of the Synod, boards, commissions, committees, task forces, and other agencies owned or controlled by the Synod are the property of the Synod and may be disposed of only under procedures and guidelines established by the Department of Archives and History and supervised by it.**

3.6.2.2.3 Concordia Historical Institute shall provide guidelines for the establishment of an archive-historical unit by each district, seminary, college, and university and other agencies of the Synod.

- (a) Copies of official documents of the districts such as articles of incorporation, constitutions, bylaws, convention proceedings, and other official publications shall be filed in the archives of the Synod. Each district shall also establish the office of “Archivist-Historian” and pattern the responsibilities of the office after those of the archives of the Synod and encourage this officer to work in close relationship with the archives of the Synod.**

Establishing a Clear District Archive Mission Statement

It is essential that each LCMS District Archive, in coordination with CHI and district leadership, carry out its work under a clear and compelling mission statement. The wording below is provided as a template and should be crafted and adopted in coordination with CHI and district leadership.

THE MISSION OF THE ARCHIVE OF THE _____ DISTRICT

As the official archive of The _____ District of The Lutheran Church—Missouri Synod, the District Archive / District Archivist serves as the active steward and manager for historical interests within the district, including district officers, district departments, district committees, as well as educational institutions and congregations of the district.

The District Archive / District Archivist is charged with preserving and promoting the history of the _____ District, including the congregations within the district. This is done through actively collecting, organizing, cataloging and preserving relevant documents, photographs, books, artifacts, and fine art and making these historical items available to inform and inspire the church and community within the district and the Missouri Synod.

Establishing District Archive Goals and Objectives

After establishing a clear mission statement, more specific goals, objectives, and responsibilities should be developed. These may include:

Goals and Objectives

- Discuss with Concordia Historical Institute a mutually-beneficial Memorandum of Understanding for sharing of archival resources.
- Begin to establish policies that bring consistency to the way archival material received or contained in the district archive is handled and shared.
- Explore ways in which the services of the district archive can be utilized among the district leadership and district congregations.
- Explore ways in which congregations can establish their own archive and receive training by the district archivist.
- Explore ways in which the district archivist can further knowledge and experience with retrieving, preserving, cataloging, digitizing and sharing archival material.
- Set a realistic timetable for further organizing and digitizing of archival material in the district archive.
- Regularly evaluate the environment in which district archival materials is being kept. What more can be done to insure these materials will be preserved for future generations?
- Set an annual budget to enable the district archive to carry out its important work.
- Set a timetable to learn more about how to effectively conduct an oral interview. Interview (audio or video) individuals with significant experiences within the district that need to soon be captured.
- Hold regular reviews with District leadership concerning the needs and performance of the district archivist.

Establishing and Clarifying the Relationship Between the District and the District Archive / District Archivist

A formal statement (usually in the by-laws or handbook) placing the archives into the administrative structure of the district gives the district archives (and the district archivist) the authority to manage the district archives under the supervision of district leadership. A comprehensive example is provided below.

The District shall establish a depository to retrieve and preserve legal and historically significant documents, photographs, media, and artifacts, shall establish the position of District Archivist, and provide appropriate resources for the District Archivist to carry out their responsibilities.

The files of all officers, boards, committees, and task forces are the property of the District and are to be deposited with the archivist when they are no longer in current use. Some files may be marked as confidential and accessed only by special permission of the District officers.

The records of congregations in the District that close are to be transferred to Concordia Historical Institute.

Please note the important statement that makes it clear that all documents generated by those who have responsibility in the district are the property of the District and need to be managed as such. See the Concordia Historical Institute's *Record and Archive Management Program (RAMP) Handbook* for a more detailed discussion of this critical aspect of the nature of District-generated material and its proper disposition.

Establishing A Position Description for the District Archivist

Position descriptions for the District Archivist (and any auxiliary positions) should also be developed and crafted based on the specific situation of the district and the archivist. A comprehensive position description for the District Archivist is provided below.

Part-Time District Archivist Position Description

The District Archivist is appointed by the District's Board of Directors and serves as the district manager and advocate of the historical interests on behalf of district leadership, district entities, as well as district schools and congregations.

The District Archivist is charged with preserving and promoting the history of the District and the Missouri Synod. This is done through actively collecting, organizing, cataloging, and preserving relevant documents, photographs, books, artifacts, and fine art — and making these historical items available to inform and inspire those in the district and regional community.

The District Archivist reports to and has regular consultations with the District President. The District Archivist works in cooperation with the District Office Manager and the Executive Director of Concordia Historical Institute. The District Archivist supervises volunteers from the district to help in the retrieving, organization, cataloging, and exhibiting of archival material.

Core Responsibilities

The District Archivist is responsible for actively managing and advancing the district archives and their use by church and community. The District Archivist is the lead advocate who argues for the importance of the archive and appropriate resources for its long-term sustainability. The District Archivist creates and champions budgets and requests for other resources, creates management timetables and plans of action to retrieve, organize, digitize, and catalog archival material in the district. The District Archivist also advocates for the study and research of the district's rich history, including that of the churches and schools of the district (may include exhibits and speaking engagements at the district and congregational levels). Finally, the District Archivist is the "gatekeeper" in insuring that the archival material in the district archive is kept secure, handled appropriately, and returned to its proper place in the archive by those who make use of it.

Please also note that the District Archivist is responsible for communicating to the District President and District Board of Directors long-range plans for advancing the District Archives and writing and submitting a report to each District Convention.

Tasks Assigned to the District Archivist

The Position Description should concern itself with central or core responsibilities and expectations. A more detailed (and more lengthly) listing of specific tasks should also be developed and regularly reviewed and updated. A comprehensive listing is provided below.

Receiving of Material for the District Archive Collection

- Create and maintain a paper trail documenting donation of specific material to the District Archive.
- Develop policy regarding the scope of the District Archive Collection and facilitate a permanent home for materials outside the scope of the District Archive Collection.

Organizing and Cataloging Archival Materials

- Develop and maintain details (finding aids) and short biographies of archival material received and already in the District Archive collection.

Preserving Archival Material

- Assess condition and risk of individual materials in the District Archive collection. Place restricted, confidential material in guarded location. Identify materials that need to be conserved / restored in order to be preserved.
- Assess and maintain an appropriate environment (including temperature, humidity, secure access, pest control) for the District Archives.

Creating and Maintain District-wide Policies Related to the Long-term Sustainability of the District Archives

- Implement and educate district and congregational leadership regarding a district-wide Records and Archive Management Program (RAMP).
- Create district-wide policy that includes the District Archivist as soon as a congregation makes the decision to close. Support and educate congregational leaders regarding organizing and transmittal of legal and historical materials to the district archives and ultimately to Concordia Historical Institute.

- Create policy regarding the persons given the authority to deaccession and dispose of material in the District Archive.
- Create policy regarding access requests to restricted / confidential material in the District Archive.

Education / Training of Support Team and Volunteers

- Encourage the education / training of congregational and school archives and archivists (possibly in coordination with the district's LWML archivist).
- Advocate for historical research and reporting when congregations or other district entities commemorate a major anniversary.



Photo by Sergiu Valena on unsplash.

**Clarifying the relationship between the District
and the District Archive is critical to the
long-term success of the District's mission.**

Providing and Maintaining Appropriate Spaces for the District Archives

The level of providing and maintaining appropriate space for the District archives is one of the most immediate indicators of how the district leadership views the significance of the district's history in "honoring our past and inspiring our future." Placing the district archives at high risk by placing them in an inappropriate environment (including temperature, humidity, UV light, pests, corrosive folders, boxes and containers, lack of security) has a direct connection to their longevity, usefulness, as well as present and future benefit.

Responsible care and management of district archives demands providing and maintaining not only appropriate spaces for the storage of the District Archives but appropriate spaces for the processing of and interaction with the archival material.

As an advocate for the archives, the District Archivist along with the District leadership is charged with insuring that the archival materials are managed in an environment that will extend their longevity as well as their use by individuals and entities in the District as they honor their past and clarify their identity while, at the same time, finding direction for the future.

Provisions for housing the archives as well as spaces to process and interact with the archival material must be included when a District Archive is created or relocated. Appropriate space must take into account the present volume of the District's archival material, the percent of archival material that has been organized and cataloged (which will normally consolidate the material received), space for the District Archivist, space for a processing workroom, and completely different space for users and researchers to interact with archival material the District Archivist provides (users requesting access to archival material from the District Archive should be given a space completely separate from the space(s) used to process and catalog archival material).

Concordia Historical Institute is a ready source as districts consider how best to responsibly manage and advance their archival collection.

Optimum Temperature and Humidity

Storage rooms where the District Archives are kept should be maintained at a temperature of 68°F (+/- 2°F) and a relative humidity of 45% (+/- 2%).

Providing and Maintaining Appropriate Archival Resources for the District Archives

Clean, environmentally controlled space for the District Archive is not the only critical component when building or maintaining the District Archive. Appropriate shelving (at least 15" deep), archival boxes and file folders, as well as clear labeling materials are necessary to file and find (and re-file) archival material in the collection.

Moreover, different types of archival material demand different storage parameters. Loose paper documents are stored differently than groups of photographs, slides, or motion picture film. Framed oil painting are stored differently than paraments or congregational artifacts.

The District Archivist is encouraged to create a long-range plan that will reduce risk and enhance the collection and its use through the use of archival quality storage materials.

The District Archivist may craft a wish list of desired equipment, (which may include a computer, microform reader / printer, a copier, photographic copy-stand and camera, large horizontal "blueprint" filing cabinets for oversize documents and artwork) that will enhance the digitization and interaction of the collection by a variety of users.

Needed supplies and equipment should be part of annual budgets of the District.

Again, Concordia Historical Institute is a ready source as districts consider how best to responsibly manage and advance their archival collection.

Making Provisions for a Disaster Recovery Plan

It is an extremely unfortunate but very real fact that a large amount of archival material in District archives has been lost when a disaster unexpectedly strikes. One district in the Missouri Synod lost a sig-

nificant amount of archival material when a water pipe burst; a Missouri Synod university lost material from water damage as a result of roof damage. Smoke and heat damage occur to archival materials—even though they are placed in “fireproof” file cabinets.

Concordia Historical Institute has more recently been involved in rescuing archival material attacked by insects and mold. Additionally, digitally created and stored archival materials are lost when servers and hard drives suddenly fail (or the computer software no longer can open a file created by an earlier version of the software program).

A disaster recovery plan should be established / implemented before disaster unexpectedly strikes. Currently there are very helpful resources available for District Offices and the District Archivist.

Please note that often archival material can be recovered even after water damage has occurred. Technologies are available to remove water / moisture (and even smoke damage) from paper documents. The District Archivist should immediately consult specialists in document recovery technologies before discarding damaged archival material.



Photo by Helloquence on unsplash.

Setting District Archive Collection Management Policies

Policies are developed by the District President / District Archive Committee and “blessed” by the District’s Board of Directors. The District President / District Archive Committee is responsible for the proper implementation of the Collection Management Policy and exercises oversight while delegating day-to-day management of the Collection to the District Archivist. Collection Management Policy will be reviewed and re-evaluated by the District President / District Archive Committee with the District Archivist at least every 6 years.

Purpose Statement

The District holds its Archive Collection for the benefit of the District, District entities, as well as the benefit of the broader Missouri Synod. The District Archive Collection Management Policy establishes guidelines, procedures, and legal responsibilities for the active management of the District’s Archive Collection. In addition, the Collection Management Policy demonstrates the District’s commitment to maintaining high standards of professional and ethical excellence in the management of the materials entrusted to it.

The Scope of the District Archive Collection

The scope of the District Archive Collection must be realistic, manageable, and sustainable. Suggested wording is provided below. Note that when a district desires to also establish a research reference library, or a permanent historical display, or a museum on the history of the district, the scope of the collection can be modified to also include reference materials and display/museum materials as secondary in the Archive Collection scope.

The scope of the _____ District Archive Collection shall be legal and historically significant material* that directly touches on the District and its history.

* Documents, published works, photographs, audio-visual material, artifacts, fine art, as well as electronic documents.

Setting Criteria for Acquisitions

It is strongly recommended that digitally-born documents be printed and organized into archival file folders and boxes before donating both printed and electronic versions of the documents to the District Archive collection.

Acquisitions to the District Archive Collection must meet the following seven criteria:

- a. Items must be directly relevant to the District's mission and consistent with the purpose and activities of the District, which chiefly consist of research, preservation, education, and exhibition.
- b. The District must be able to responsibly care for the items accepted into its Archive Collection under approved professional standards.
- c. It is intended that items brought into the Archive Collection remain in the Collection as long as they retain their physical integrity and relevance to the District's mission, goals and purposes.
- d. Title to objects should be received free of restrictions of use and future disposition. Materials that are offered for donation into the District Archive Collection that come with restrictions (perpetual display, permission by family needed for researcher access, etc.) will not be accepted into the District Archive Collection.
- e. The present owner should be able to verify ownership or be able to provide object provenance.
- f. Materials donated must be received with a District Archive Donation Receiving Record that has been properly filled out and signed by the owner of the donated materials.
- g. The District Archive will not accept any objects where the cost of conservation or care is disproportionate to the historical significance of the object.

On the other side of the District Archive Collection spectrum, policy also needs to be set in regards to criteria and procedure for deaccessioning an item from the District Archive Collection. Suggested criteria for deaccessioning is presented below.

Setting Criteria for Deacquisitions

The process of deaccessioning material in the District Archive Collection should always consider a more appropriate permanent home for the deaccessioned material. However, the following options are available to the District Archivist and/or the District Archive Committee when it comes to releasing deaccessioned items.

**Material Considered for Deaccessioning from
the District Archive Collection
must meet one or more of the following criteria:**

- a. The object or document no longer has relevance to the District's mission and collections goals.
- b. The object or document does not fit within the collection scope of the District Archive Collection.
- c. The object or document has deteriorated beyond its usefulness or the District Archive does not have the ability to properly maintain the condition of the piece.
- d. A similar item of superior condition or provenance has since been acquired by the District Archive (for items that were originally produced in multiple copies).
- e. Another Missouri Synod Archive is more suitable to care or make use of the item (such as the church records of closed congregations within the District).

Another component of District Archive Collection Policy is the matter of receiving loans into the District Archive Collection and loaning items from the District Archive Collection to other persons or entities. The simplest option is to make it the policy that:

Deaccessioned Material may be:

- a. **Transferred:** Items may be transferred to another archive, museum, or educational facility (for example, Concordia Historical Institute or a regional or local archive or museum). The transfer must be documented by the District Archivist and/or District Archive Committee.
- b. **Exchanged:** Deaccessioned items in the District Archive Collection may be exchanged for other items owned by another archive, museum, or educational facility that are more appropriate to the District Archive Collection scope.
- c. **Auctioned:** Deaccessioned items from the District Archive Collection may be auctioned to the highest bidder in a public sale, with the entire proceeds applied to the ongoing management of the remaining District Archive Collection.
- d. **Disposed of:** If all attempts to find a more suitable home for the item—whether by transfer, exchange, or auction—have been unsuccessful, a deaccessioned item may be disposed of in a responsible way.

The District Archive does not accept loaned material into the District Archive Collection, nor does the District Archive allow it material to be loaned out or leave the District Archive building.

Note that if material is given or allowed to leave the District Archive, the responsibility for the ongoing maintenance and security of the item ultimately rests with the District Archive/District Archivist.

Setting District Archive Access and Use Policies

Policy on Access To and Use of Material from the District Archive Collection

The District Archive makes its Collection available for study and academic research under its Access and Use Policy.

The District Archive recognizes its responsibility to grant reasonable access to items in its Collection for study and research. However, the safety and integrity of the items in its care is of the utmost importance. Access will be granted in keeping with professional, ethical guidelines and the District Archive's charge to safeguard the Collection from loss, deterioration, damage, or misuse.

Procedures in Accessing and Using Material from the District Archive Collection

All requests for access to research material should be submitted in writing to the District Archivist for review and approval. The type of research and dates and times available for visitation should be included in the request. The District Archivist grants approval to the request, informs the researcher of any necessary fees, and schedules times the requested material will be available in the District Archive Research area. If the request will be handled electronically, then the District Archivist will advise the researcher if the researcher's deadlines can be met.

All researchers requesting access to the District Archive Collection must fill out and sign a **User Access Agreement Form** (see an example below) that reviews how the material is to be used, provisions for photographing items from the Collection, fees for obtaining photocopies / digital photos of archival documents, copyright restrictions, and other general archive access and research guidelines.

Photography of Material from the District Archive Collection for Publication or Commercial Use

Policy regarding the photography of items from the District Archive Collection should be reviewed with the user by the District Archivist before access of material begins. The use of any images for publication (including publication on the web) or commercial use is subject to review by the District Archivist and/or the District Archive Committee before permission is granted.

User Access Agreement Form

District Archive Collection

Last Name _____
First Name _____
Institution (if applicable) _____
Street Address _____
City, State, Zip Code _____
Phone Number _____
e-Mail Address _____

Summary of Research Topic _____

Statement of Agreement and Responsibility

I certify that the information on this form is correct and I have read and agree to abide by the policies and procedures set forth in this two-page **User Access Agreement Form**. I further agree to defend and hold harmless the District and District Archive against all claims, demands, costs, and expenses incurred for any and all claims of copyright infringement or any other legal cause of action arising from my use of the District Archive materials.

User Signature and Date

FOR STAFF USE ONLY

User Access to Material in the District Archive Collection Policies and Procedures

District Archive Research Room

- Coats/Jackets, briefcases, backpacks, handbags, and any other personal belongings must be left with Archive staff prior to entering the Research Room.
- Please silence your cellphone. Talking on your cellphone is prohibited in the Research Room.
- Laptop computers, digital cameras, pencils, and notepads may be brought into the Research Room. (Electrical outlets for charging devices can be provided.)
- Users are asked to wash their hands before handling archival material from the Collection.
- No food or beverages (with the exception of water in a secure, covered container) may be taken into the Research Room.

Retrieval of Records

- You may request up to 3 boxes from the archive at a time.
- You may only have one box on the table at a time and you may only remove one folder from the box at a time. (The District Archivist will provide you with a place marker to be inserted in the spot where you remove the folder.)
- The Research Room is open Mondays and Thursdays from 10:00 am–1:00 pm. Other hours may be possible upon request.

Use of Records

- Archival material is not allowed to leave the Research Room for any reason.
- Users are charged with preserving the condition of the items accessed.
- You may take notes in pencil. Pens, markers, and highlighters are not allowed in the Research Room. Under no circumstances are marks or notes to be placed on archival material.
- Users are to strictly keep the original order of pages/documents in its folder. Please inquire about the procedure for marking the place when a paper or document is taken out from its folder. “Sticky notes” and paperclips are not allowed to be placed on archival material.
- Users have the responsibility of informing the District Archivist if any potentially confidential (client privileged documents or confidential internal memos) or personal information (social security numbers, for example) is discovered while accessing the archival material. (In some cases, sensitive information will be removed by CHI staff and a copy given to the user.)

Duplication of Records

- Digital photography of records in the Research Room is allowed. Please ensure that your cellphone’s flash is disabled prior to use. Photocopies can be made but are subject to review based on the condition of the item being duplicated.
- Photocopies are priced as follows: \$0.20 per black and white copy, \$0.45 per color copy. You will receive an invoice for these fees (if applicable) at the conclusion of your visit.

Citing Records from the Collection

- When citing specific records from the collections, please use the following citation order and elements:

Folder Title; Sub-series Title; Series Title; Collection Name. The Archives of the _____
District of The Lutheran Church—Missouri Synod, CITY, STATE. Date of Access.



Photo by Bill Oxford on unsplash.

Archival material containing sensitive information of a personal nature or confidential information archived only in case of possible litigation in the future should be clearly marked and kept in the most secure area of the District Archive.

Access to Restricted / Confidential Archival Material Housed in the Collection

Some files and documents in the District Archive Collection are marked “Restricted” or “Confidential” and while they may never be accessed by researchers, there remain legal reasons why this material cannot simply be destroyed.

For example, Concordia Historical Institute has numerous experiences of providing material marked “Restricted” or “Confidential” to lawyers and courts seeking documentation during litigation. The shredding of important documents by the District or District entities does not strengthen but weakens the documentary evidence in times of litigation.

The District Archive must place all “Restricted Access” or confidential legal documents in the most secure area of the District Archive and take steps to ensure that only authorized representatives are given access.

Restricted Access Due to Information of a Personal or Libelous Nature

Materials containing information about a living person that reveal details of a highly personal or libelous nature that, if released, would constitute a clearly unwarranted invasion of privacy or a libel (including but not limited to information about physical or mental health or the medical or psychiatric care or treatment of the individual) and which personal information is not known to have been previously made public are restricted to the agency or department that generated them.

Access is allowed only after a written letter of request for access by the originating agency or department or their lawyers.

Restricted Access Due to Information of a Confidential Financial Nature

Materials that contain financial information that was obtained with an expressed or implied understanding of confidentiality and holds

the possibility of harm to the individuals or entities named in the material are restricted to the agency or department that generated them.

Access is allowed only after a written letter of request for access by the originating agency or department or their lawyers.

Restricted Access Due to Information of a Personal or Sensitive Employee/Employer Nature

Materials containing information on appointment, tenure, employment, performance evaluation, disciplinary action and similar personnel matters are restricted to the agency or department that generated them.

Access is allowed only after a written letter of request for access by the originating agency or department or their lawyers. (Note that social security numbers of the deceased have been ruled not to be subject to restriction in the same way personal information of living people is to be held as confidential.)

Restricted Access Due to Information Related to Litigation

Materials containing information related to or compiled during an investigation of individuals or organizations are restricted to the agency or department that generated them.

Access is allowed only after a written letter of request for access by the originating agency or department or their lawyers.



Photo by Missy Stinson on unsplash.

The District Archivist constantly evaluates the needs of users accessing specific material in the District Archive vis-a-vis the nature of the archival material requested.

“Is the information within this document appropriate for unlimited public access or restricted access to only the entity who created it?”

Donor Receiving Record

The Donor Receiving Record is critical in the archival paper trail that establishes ownership and the right to actively manage, use (and possibly dispose of) materials donated to the District Archive.

The form's donor information and a description of the materials donated is filled out in the presence of the donor. The donor must read and agree with the statement below before signing the Donor Receiving Record.

This is important in the case that the donor (or other family members) later challenge the ownership and disposition of the materials donated.

The _____ District Archive accepts this gift with the understanding that it is unrestricted and offered without limiting conditions, that it will become the exclusive and absolute property of the District Archive, and that it may be managed in any ethical manner consistent with established professional standards, District Archive policy, and governmental regulations, with no restrictions on its use or disposition.

Donor / Courier Name (printed) _____

Donor / Courier Name (signed and dated) _____



Photo by John Mark Smith on unsplash.

**You can review pertinent topics
by scanning the elements included in the index
under each major index heading.**

Index

Access

policies 17–23

requests 17, 19

space used by those accessing archival material completely distinct from other areas of the District Archive 10

to Confidential / Restricted Records / Documents 6, 9, 20, 21–23

Closed Congregations

archival material to be sent to Concordia Historical Institute 3, 8, 15

importance of including the District Archivist in the initial stages of closing a congregation 8

Concordia Historical Institute

charged to work closely with the District Archivist 4

charged with providing guidelines for establishing District Archives 4, 10

designated as the Department of Archives and History in 1959 3

in partnership with and resource for District Archives 1, 3–4, 10, 11

mutual objectives with District Archive 1

to receive church records and archival material of closed congregations 6, 8

to receive District articles of incorporation, constitution, bylaws, convention proceedings, and other
District publications 4

Congregations within the District

encouraged to curate archival material of their congregation 5

encouraged to use District Archivist and Concordia Historical Institute as tutorial and historical resources 5, 9

Congregational Records of Closed Congregations

to be sent to Concordia Historical Institute 3, 8, 15

Confidential / Restricted Records / Documents 6, 9, 20, 21–23

Disaster Recovery Plan 11–12

Disposal of Records

created by Missouri Synod agencies only under procedures and guidelines established by Concordia Historical
Institute 3–4

in distinction to deaccessioning District Archive Collection items 9

District

Articles of Incorporation to be received by Concordia Historical Institute 4
Convention Proceedings to be received by Concordia Historical Institute 4
Publications produced by the District to be received by Concordia Historical Institute 4
relationship with the District Archive / District Archivist critical 6, 9
required to appoint a District Archivist 4
required to be responsible manager of District Archives 1
required to establish a District Archivist 4
Revisions of District Bylaws to be received by Concordia Historical Institute 4
Revisions of District Constitution to be received by Concordia Historical Institute 4
to encourage curating archival material in each District congregation 5

District Archive

also referred to as District Depository 6
appropriate environment, including temperature, humidity, light, pest control, containers, and security 10, 11
archival file folders and boxes 11
archival material must be kept secure, handled appropriately, and returned to its proper place 7
archival storage containers 11
archives placed at high risk if environment is not controlled 10
began with creation of Districts in 1854 3
charged to keep collection from loss, deterioration, damage, or misuse 17
creating District-wide policies, procedures, and activities that ensure the long-term sustainability of the
District Archive 8
different spaces within to carry out different functions of 10
digital camera 11
document scanner 11
Donation Receiving Record 14
encouraged to develop a Memorandum of Understanding with Concordia Historical Institute 5
establishing 3–12
filing cabinets for oversized archival materials 11
functions demand different kinds of spaces within the District Archive 10
functions of (collecting, organizing, cataloging, preserving, and sharing) 4, 7, 14
goals and objectives 5
guidelines for establishing to be provided by Concordia Historical Institute 4
honors past, informs identity, and inspires the future iii, 7, 10
houses legal records and historically significant materials 6
in partnership with Concordia Historical Institute 1, 3–4
insuring the longevity of archival materials in the District Archive 10
labeling materials 11
managing demands new partnerships 2

managing demands new ways of efficiency **2**
 managing is intentional and active **1**
 managing of is responsible stewardship **1**
 managing with limited resources **2**
 material — different types of (documents, publications, photographs, audio-visual material, artifacts, fine art) **1, 4, 6, 7, 13**
 microform reader **11**
 mission statement of **4**
 must be able to ensure long-term sustainability of archival materials in the District Archive **14**
 organizing and cataloging material in the District Archive Collection **8**
 photocopier **11**
 photographic copy-stand **11**
 policies of **13–23**
 preserves and proclaims the faithful work of the District **iv, 1, 4**
 preserves and proclaims the Lord's work in the District **iv, 1, 4**
 preserving material in the District Archive Collection **8**
 providing appropriate spaces for **10**
 purpose of:

- to preserve as well as make discoverable and available to current and future generations in church and community **1, 4, 10**
- to witness to the redeeming work of Christ in the District **1**

 receiving material for the District Archive Collection **8**
 relationship with Concordia Historical Institute **3–4**
 relationship with the District **6**
 safeguards records / documents marked restricted / confidential **6, 20**
 sends church records and archival material of closed congregations to Concordia Historical Institute **3, 6**
 shelving **11**
 space for storage and interaction with the District Archive Collection is critical **10**
 to receive records of Records created by District officers, Boards, Committees, and Task Forces **6**
 treasures and trumpets the faithful work of the District **iv, 1, 4, 7**
 treasures and trumpets the Lord's work in the District **iv, 1, 4**

District Archivist

acts as a resource for congregations planning major anniversaries **9**
 also referred to as “Archivist-Historian” in Missouri Synod Handbook **4**
 appointed by the District President or District Board of Directors **7**
 as active steward and manager of the historical interests within the District **4**
 as lead advocate of the District Archive **vi, 7**
 controls public interaction / use of the District Archive Collection **17, 20**
 crafts and implements a Disaster Recovery Plan for the District Archive **11–12**

- develops skills in conducting oral interviews of historically significant people in the District 5
- drafts and submits annual budget and needed resources 5
- encouraged to work closely with Concordia Historical Institute 4
- ensures spaces used for District Archive storage and interaction are free from insects and mold 12
- explores the possibilities of displays and museum exhibits (temporary and/or per-manent) that promote the functions of (collecting/retrieving, organizing, cataloging, digitizing, preserving, and sharing) 4, 5, 7
- history of the District 7, 14
- job description 7
- list of tasks assigned to 8
- manages the historical interests of the District 7
- position description 7
- preserves and proclaims the faithful work of the District iv, 1, 4, 7
- preserves and proclaims the Lord's work in the District iv, 1, 4
- promotes policies, procedures, and activities that honor the past, informs the present, and inspires the future iii, 7, 10, 13–23
- promotes the long-term sustainability of the District Archive 7
- promotes the study of the District's history 7
- relationship with the District critical 6, 9
- reports and has regular consultations with the District President (and District Archive Committee) 7
- responsibilities to be patterned after responsibilities of Synod's Archives 4
- responsible for keeping District Archive Collection secure 7
- responsible for regular monitoring of physical environment where archives are kept 5
- reviews appropriateness of access to restricted / confidential materials 21–23
- sends church records and archival material of closed congregations to Concordia Historical Institute 3, 6
- sets timetable for furthering the advance of the District Archive 5
- supervises and trains volunteers who work in the District Archive 7
- ultimately responsible for loaned items 16

District Bylaws

- should include statement regarding the relationship between the District and the District Archive / District Archivist 6

District Leadership

- as advocate of District Archive vi
- reviews District Archive policies 13

District President

- as advocate of District Archive vi
- supervises and meets regularly with the District Archivist 7

Donation Receiving Record 14, 25

Long-term Sustainability of the District Archive 8

Management Policies and Procedures 13–23

- Access and use 17–23
- Access to Restricted / Confidential material 21–23
- Acquisitions criteria 14
- Citing Records from the District Archive Collection 19
- Commercial Use of Images from District Archive Collection 17
- Deaccessioning / Deacquisition criteria 15–16
- Deacquisition / Deaccessioning criteria 15–16
- Donations offered, but with restrictions 14
- Donations only accepted with Donation Receiving Record 14
- Duplication, Photocopying, Copyright, and Fair Use 17, 19
- Items on loan to the District Archive 16
- Loaned items from the District Archive 16
- Photography of District Archive materials 17
- Purpose Statement 13
- Research Room policies and procedures 19
- Restricted / Confidential material, access to 21–23
- Scope 13, 15
- Use Access Fees and Charges 17, 19
- User Access Agreement Form 17–19

Memorandum of Understanding

- between District Archive and Concordia Historical Institute 5

Oral Interviews

- of historically significant people in the District, conducting 5

Record and Archive Management Program (RAMP) 6, 8

Records created by District Officers, Boards, Committees, and Task Forces

- are the property of the District and are to be deposited in the District Archives 6

Records created by Missouri Synod Agencies

- to be disposed of only under procedures and guidelines established by Concordia Historical Institute 3–4

Responsibilities of individuals accessing District Archive materials 19

Restricted / Confidential Records / Documents 6, 9, 20, 21–23

Volunteers

- who work in the District Archive 7

Notes



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historical
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Honoring our Past
Inspiring our Future