¶ 641.1-4  In each Annual Conference there shall be a conference Commission on Archives and History. The number of members of the commission and their terms of office shall be as the conference may determine and may include an ex officio representative of each United Methodist Heritage Landmark in its bounds. It shall be the duty of the commission to collect, preserve, and make accessible the historically significant records of the annual conference and its agencies, including data relating to the origin and history of the conference and its antecedents; to encourage and assist the local churches in preserving their records, compiling their histories, and celebrating their heritage; to provide for the permanent safekeeping of the historical records of all abandoned or discontinued churches in the bounds of the annual conference and its antecedents (see ¶ 2549.3); to maintain a fire-safe historical and archival depository and to see that all items which obviously will have value for future history are properly preserved therein; to provide for the ownership of real property and to receive gifts and bequests; to nominate to the General Commission on Archives and History buildings, locations, or structures within the annual conference for designation as historic sites or heritage landmarks; to maintain contact with officially designated historic sites and heritage landmarks in their bounds; to assist the bishop or the appropriate conference committee in planning for the historical hour and other appropriate historical observances at annual conference sessions; to establish retention and disposition schedules for annual conference and local church records under standards or guidelines developed by the General Commission on Archives and History; to cooperate with and report, when requested, to the general and jurisdictional commissions on archives and history; and to engage with other Wesleyan, Methodist, or Evangelical United Brethren-related denominations in lifting up our joint heritage.

2. The commission may organize a conference historical society and encourage membership therein for the purpose of promoting interest in the study and preservation of the history of the conference and its antecedents. The officers of the conference commission on archives and history may be the officers of the conference historical society. Membership in the historical society shall be established as the society may determine. Membership may include the payment of dues as the society may direct, and in return, members shall receive official publications and publicity materials issued by the commission and the society and such other benefits as may be deemed suitable.

3. Each annual conference may have a historian to undertake specific duties as may be designated by the commission. The annual conference historian may be a member of the annual conference commission on archives and history.

4 The annual conference commission on archives and history shall work with the ethnic congregations of the conference to develop and preserve the historical records of those congregations and antecedent conferences.
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INTRODUCTION

We are pleased to offer the sixth edition of this Manual for the Annual Conference Commission on Archives and History. The Book of Discipline lists the commission’s responsibilities, and this manual is a resource to assist the commission in fulfilling those duties.

In addition to fulfilling basic administrative responsibilities, we hope that each commission will actively recover, study, interpret, and celebrate our shared heritage. Local churches, the Annual Conference, and the general public are depending on you to meet their needs. This manual offers general guidance that we hope will help you do just that. Of course, each situation is different, and the suggestions offered here are intended to be neither limiting nor exhaustive.

The specific disciplinary provisions for the Annual Conference Commission on Archives and History are listed on the inside front cover. Please read these paragraphs carefully. They describe your duties and give you the authority to proceed with your work.

As you begin your work, remember:

✧ Your role in the Annual Conference is crucial, for you will ensure that vital information is collected and preserved for the future.

✧ Your relationship to the local church is crucial, for you will provide leadership, encouragement, and support for the recovery of history at its most important level.

✧ Your involvement in the wider historical community is crucial, for you are an important link in the connectional chain that binds us all together.

The staff of the General Commission on Archives and History is prepared to assist you upon request. Write, call, or email us.

Alfred T. Day III, General Secretary
L. Dale Patterson, Archivist/Records Administrator
Brian Shetler, Methodist Librarian

General Commission on Archives and History
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How can your conference commission become most effective? A key step in the process is developing and maintaining a strong membership. Commission members should be knowledgeable about their responsibilities and enthusiastic about their work. All too often, the public views archives and history as unimportant and boring, dealing only with “names, dates, and old stuff.” That image needs to give way to a more dynamic, comprehensive understanding. No one else in the conference will come to such a view until your members become skilled advocates for the commission’s work.

The commission also needs to build its reputation within the constraints of its current circumstances. It needs to demonstrate reliability and competence as an agency of the Annual Conference. Until this happens, it is unlikely that much consideration will be given to adding capable persons to the commission’s membership. While existing circumstances are often trying, the commission still needs to be as efficient, productive, and creative as possible in the present before it can expect positive changes in the future.

Once you begin to address these issues, you can work to cultivate a good relationship with the conference nominating committee (or its equivalent) and other conference leaders. Hard-working, conscientious volunteers, whether laity or clergy, are at a premium in any conference, and there will undoubtedly be competition for such persons from other conference agencies. The commission needs to understand this reality, but still act as a strong advocate for its own needs and interests. Obviously commission leaders should follow existing guidelines for the nominating process, while recognizing that these have both formal and informal aspects. It is sometimes helpful for commission leaders to suggest possible candidates for membership on the commission. Always give appropriate consideration to gender, racial, and age balance, especially encouraging younger persons to get involved.

Membership training is another important task. Set aside a specific time to introduce new commission members to their responsibilities. Such training can be provided by the current leadership or an outside resource person. Provide new (and current) members with printed materials such as commission bylaws, past or current publications, this manual, a glossary of historical and archival terms, commission meeting minutes, and financial information.

Encourage members to attend archival or historical workshops which are sponsored at the area, jurisdictional, or general church level. The commission can also schedule mini-workshops or “work days” as means of additional training. Commission members should look outside the church as well, using the resources of such agencies as the American Association for State and Local History, the Society of American Archivists, and state and local historical societies. Members should join the
Historical Society of The United Methodist Church, and read *Methodist History*, *Historian’s Digest*, and publications of the World Methodist Historical Society.

The day-to-day management of commission work can make or break the interest of its members. People need to feel that they are a genuine part of the commission and that they have a definite role to play. Nothing will ruin their interest more rapidly than the feeling that they are simply extra wheels on the cart. Assign specific responsibilities to every commission member and request progress reports at regular intervals.

Remember that members of the General Commission living within your Annual Conference serve as ex officio members of your commission. (See *The Book of Discipline*, 2016, ¶610.6).

Commission leadership has a key task. The chairperson and other elected or appointed leaders need to carry out their responsibilities in a competent and knowledgeable manner. Prior to meetings, for example, a set of materials should be mailed to all members. This can include a proposed agenda and a list of decisions to be made. Meetings should start and end at the specified times. There ought to be a consensus on the agenda. The chairperson should monitor the progress of the meeting, the needs of the members, and the passing of time. Minutes should be properly taken and promptly transcribed, with copies provided to all members within a reasonable time after each meeting. Through it all, commission leaders need to demonstrate patience, tact, and common sense, while maintaining an overarching vision of the purpose and work of the commission.

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**FINANCES**

Finances are a major concern for any conference commission. Often the work of the commission is significantly under-funded. It is impossible for a commission to fulfill its responsibilities without adequate financial support. The commission needs to be its own strongest advocate if it expects to receive increased funding.

Commission leaders need to understand precisely how the funding process works in their Annual Conference. Submit budget requests in the proper form, on time, and with the appropriate rationale. Be prepared to make a reasonable defense of your budget requests, either before the Council on Finance and Administration or on the floor of the Annual Conference. When defending your requests, be sure to draw attention to the assigned duties of the commission in *The Book of Discipline*, especially the care of conference records.

The process of upgrading the working budget of a conference commission is not an easy one. There is competition for funding within any Annual Conference, and you will need to make a strong case for increasing the commission’s budget. Compare your budget to those of commissions in other Annual Conferences. Those figures can help you structure a budget request that will at least bring you to a level near the jurisdictional or denominational average. It can be useful to develop a “dream budget” of what really could happen if funding were not an issue. Then the actual asking might not...
Budget requests may include funds for commission meetings, maintenance of historical center(s), staff training and support, equipment and supplies, workshops and publications, Historic Sites (and Heritage Landmarks, where appropriate), and memberships in historical groups (including jurisdictional commissions/historical societies and the Historical Society of The United Methodist Church).

The actual management of commission finances is likewise important. Handle your expenditures according to established procedures in the Annual Conference. Use the appropriate forms and do not exceed budget allotments. Any questions about the use or disbursement of funds should be promptly and readily explained. Responsible use of existing budgetary funds will be a point in favor of possible increases in subsequent years.

There may be occasions when a commission goes outside the regular conference funding channels. This might be for such things as a special publishing project or to obtain equipment that cannot be provided through normal procedures. How can the funds be raised? Through applications to foundations, historical societies, or private institutions; with special offerings at heritage events; or through an endowment fund established by the commission. With conference approval, an offering can be received on Heritage Sunday for special historical projects. When you undertake any fund-raising effort, it is vital to communicate clearly with the Council on Finance and Administration and other conference leadership in order to preclude any possible misunderstanding. Remember that the historical society of an Annual Conference can often spearhead fund-raising for projects.

Do not neglect the commission’s long range financial needs. These ought to be in harmony with your quadrennial goals. In many Annual Conferences, for example, the needs of the conference archives cannot be adequately dealt with in a single year’s budget. The commission must have a clear understanding of the needs, costs, and priorities involved in upgrading its archival depository. This can become part of a systematic effort over several years to improve the facility, or it can become the focus of a special project. The same long-range perspective can be brought to bear on such efforts as the publication of a conference history, preparations for a conference bicentennial celebration, plans for a multi-year oral history project, and so on.

Throughout this entire process, it is important for commission leaders to work openly and responsibly with other conference agencies and leaders. The commission, while being its own advocate for budgetary and other needs, is also part of the Annual Conference. Commission leaders must recognize the needs and aspirations of other conference entities, as well as the financial realities under which the entire conference operates.

As we have already discussed, it is important to give commission members specific tasks and responsibilities. These
tasks can range from administrative duties to publicity to historical research and writing. Commission members can lead workshops, index newspapers, edit publications, interview retired conference members, or any number of assignments that further the ministry of history in your conference.

However, some aspects of archival work demand personnel with specialized skills and training. You may have an historian, archivist, librarian, curator, or some combination of these roles held by one or more individuals. These persons may be volunteer or paid, part-time or full-time, and may do other work for the conference or for the institution where your historical center is housed. For example, if your archives are housed in a college library, your archivist may also be the university archivist.

Whatever the title, these positions, whether paid or volunteer, should have written job descriptions that are reviewed at least annually. Persons who are paid for doing a task should not be voting members of the commission. Volunteers may very well be members of the commission. Any person assigned to an ongoing role should expect to report regularly to the commission on his or her work.

Paid positions should always be advertised when vacant. The commission should select the most qualified applicant and provide at least the same support and benefits as those received by other conference employees.

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**BYLAWS**

The commission should consider creating a set of bylaws (some conferences call it a constitution) to govern your work. Provisions of the bylaws can include how your commission will be organized, how often it will meet, the types of committees it will have, its work with conference Historic Sites, the conference historian, and other programmatic concerns in addition to its management of the archives. It is often useful for the commission to create a handbook for its members that contains the bylaws and other documents created by the commission, including those discussed in this manual.
ANNUAL CONFERENCE COMMISSION ON ARCHIVES AND HISTORY
SAMPLE BYLAWS

[Brackets indicate places for you to adapt text for your situation.]

Article I. NAME

The name of this organization shall be the [           ] Conference Commission [Committee] on Archives and History of The United Methodist Church.

Article II. PURPOSE

Section 1. [Copy here paragraph 641.1 of The Book of Discipline, 2012 beginning with sentence three.]

Section 2. [Copy here paragraph 641.4]

Section 3. [Add any other duties of your commission.]

Article III. MEMBERSHIP

[Include here a clear comprehensive statement of the membership of the commission, how they are elected or appointed, by whom, when, the term of office, any limitations on tenure, how vacancies are filled, etc.

EXAMPLE: The ten members of the commission are elected each quadrennium by the conference upon nomination of the nominating committee. At least one lay person and one clergyperson shall be selected from each district. No person may serve more than three consecutive quadrennia. Vacancies will be filled by the conference at its next annual meeting. A vacancy occurs if a member misses two consecutive regular meetings without good reason.]

Article IV. MEETINGS

The commission shall meet [         ] and at such other times as may be deemed necessary at such time and place as it shall determine. Special meetings may be held at the call of the president or [          ]. A quorum is any number of members present at a properly called meeting.

Article V. OFFICERS

Section 1. The commission shall elect a chairperson [unless the conference elects this officer], vice-chairperson, secretary, treasurer [or secretary-treasurer], and [other officers] for terms of four years each. Vacancies in the respective offices shall be filled at the next meeting for the unexpired term or may be accomplished by mail ballot.

Section 2. The duties of each officer will be those normally required of the particular office. The chairperson shall make an annual report to the Annual Conference, as well as to the Jurisdictional and General Commissions on Archives and History.

Section 3. The commission may designate an historian, archivist, librarian, and/or curator. They may be ex-officio members of the commission with voice and vote. If they are paid staff, they may be ex-officio members of the commission with voice but not vote.

Section 4. The commission shall form an Executive Committee composed of its officers and one member of the commission elected by the commission at large.
Article VI. FINANCES

Section 1. Allocation of funds necessary for the operation of the commission shall be made by the Annual Conference. The commission shall submit an annual budget in accordance with conference procedure.

Section 2. Allocation of funds necessary for the operation of the commission shall be made by the Annual Conference. The commission shall submit an annual budget in accordance with conference procedure.

Section 3. The commission may maintain special funds given expressly for its work in accordance with conference policy. The commission may accept gifts, bequests, or legacies.

Article VII. ACCOUNTABILITY

Section 1. The commission is amenable to the Annual Conference to which it shall report at least annually.

Section 2. Unless otherwise stipulated, all records in the custody of the commission shall be the property of the Annual Conference and the commission shall be the custodian thereof.

Section 3. The commission shall cooperate with and be amenable to the conference Council on Ministries in order that its program emphases may be integrated into the total unified program of the conference. All plans shall be cleared through the Council.

Article VIII. HISTORICAL CENTER(S)

The commission shall be in charge of archives, libraries, museums, and other depositories and shall have authority to determine the location of same. Title to all materials and real property shall be vested in the conference Board of Trustees, but the commission shall retain authority of control, protection, cataloging, and responsibilities for use and care of such materials.

Article IX. HISTORICAL SOCIETY

The commission may organize a conference historical society and encourage individuals to become members of it for the purpose of promoting interest in the study and preservation of the history of the conference and its antecedents.

Article X. BYLAWS

The commission may revise these bylaws if the changes are in harmony with The Book of Discipline of The United Methodist Church and the actions of the Annual Conference.

Article XI. AMENDMENTS

These bylaws may be amended by a majority vote of the commission at any meeting if written notice of the intended changes has been given to members at least two weeks in advance. They shall be reviewed at least annually.

Article XII. PARLIAMENTARY AUTHORITY

Robert’s Rules of Order Newly Revised shall apply in all circumstances where it is not in conflict with the Discipline, actions of the Annual Conference, or these bylaws.
SAMPLE AGENDA FOR COMMISSION MEETINGS

✓ Invocation or Devotional and/or Historical Moment

✓ Minutes of Previous Meeting: Review and Approval

✓ Purpose and Agenda for this meeting

✓ Report of the Executive Committee and/or Officers, including financial report

✓ Reports of Standing Committees (if any)

✓ Reports of Special Committees or Projects (if any)

✓ Reports of Staff (such as Historian or Archivist) (if any)

✓ Correspondence (General Commission, Jurisdiction, Annual Conference, other)

✓ Ongoing Concerns and Responsibilities of the Commission:
  - Conference Records - care and collection
  - Conference Historical Center(s) - archives, library, museum
  - Historic Sites (and Heritage Landmarks, where applicable)
  - Plans for next Annual Conference session
  - Plans for next Heritage Sunday
  - Service to Local Churches (Preserving Records and Compiling Histories)
  - Conference Historical Society (establishing or continuing support)
  - Other projects and activities

✓ New Business

✓ Program: Possibilities include: a speaker, a visit to an Historic Site, presentation of paper and discussion, workshop, or media presentation

✓ Setting the next meeting

✓ Announcements and adjournment
It is the commission’s task to direct and develop the conference archival program. This does not mean that the commission is responsible for the day-to-day operations of its archives. Rather, the commission sets the overall policy and direction of the archives, monitors the archival program, and maintains appropriate contacts with necessary personnel and institutions. The commission can accomplish these tasks most effectively with a series of policy statements and by-laws that set the tone and direction of the commission’s work.

**Mission Statement**

One of the first official statements you should develop is a *mission statement*. A *mission statement* should be brief, usually no more than a few paragraphs. It states why the archives program exists. If you prefer, the mission statement can be broadened to state the rationale for the entire program of the commission. This statement should always be concise and clear. It is helpful to begin with language from *The Book of Discipline*, which you can summarize or expand upon. Perhaps your commission has a special interest in the personal papers of clergy, or religious periodicals, or denominationally related schools - that is to say, in some specific aspect of your conference’s history. This can be included in your mission statement.

The mission statement is the guiding principle in your work as a commission. This document should be placed before the conference, included in the conference journal, and referred to whenever the opportunity arises. Below is a sample mission statement that you may wish to adapt for your purposes.

> It shall be the duty of the commission to collect and preserve the historically significant records of the Annual Conference and its agencies, including data relating to the origin and history of the conference and its antecedents.

**Collection Policy Statement**

The next document you should create is a *collection policy statement*. A *collection policy statement* is built from the *mission statement*. It is a detailed description of how the mission will be carried out. The *mission statement* helps the commission and others understand what the commission does, while the *collection policy statement* deals with how the commission does its job.

The *collection policy statement* assists the archivist with the acquisition of materials. While it is clear that conference agency records will go to the archives, the policy will clarify which records will be collected, and if conference publications will be collected along with personal papers, books, periodicals, and audiovisuals. In short, the *collection policy statement* describes how broadly, or narrowly, the commission will collect. For example, if the commission collects personal papers,
there should be guidelines as to what will be accepted. The commission may not wish to accept every deceased clergyperson’s Bible. The collection policy statement is a tool which enables the archivist to accept or reject material in a consistent manner, and to focus on the collection priorities mandated by the commission. A sample collection policy statement follows:

The Annual Conference Commission on Archives and History

1. Shall collect material relating to the origin and history of the conference and its antecedents. This will include:
   - All official publications of the conference,
   - All minutes of the conference boards and agencies,
   - Reports of the District Superintendents and conference camps and conference schools,
   - Published and written histories of the Annual Conference and its antecedents

2. Encourage and assist the local churches in preserving their records, compiling their histories, and celebrating their heritage by
   providing workshops on these topics including records management for the local church, and
   acting as a responsible resource to direct the local church to others who can help in their preservation and history concerns.

3. Maintain the historical records of all abandoned or discontinued churches in the bounds of the Annual Conference and its antecedents [and the historical records of any active church that so requests it].

4. The depository will be at [name the location] and will be open to the public during regularly posted hours.

5. Personal papers of clergy, missionaries, deaconesses, and lay people associated with the conference and its activities may be donated to the conference archives. The archives will accept manuscripts and printed material related to the history of the Annual Conference, United Methodism, and their antecedents.

Access and Use Policies

Another important set of statements are the access and use policies. These documents amplify ideas found in the mission statement. It is important to remember that the archival profession and The United Methodist Church are both in favor of open access to open records balanced with an appropriate level of concern for privacy. The Code of Ethics for Archivists states, “Archivists...encourage use of [their holdings] to the greatest extent compatible with institutional policies.” The Book of Discipline in ¶722 states that all meetings of all agency boards are open, with the following exceptions: “real estate matters; negotiations, when general knowledge could be harmful to the negotiation process; personnel matters; issues related to the accreditation or approval of institutions; discussions relating to pending or potential litigation or collective bargaining; communications with attorneys or accountants; deployment of security personnel or devices and negotiations involving confidential third-party information.” It further states, “Documents distributed in open meetings shall be considered public.” This means that those records are open to
researchers. At the same time there must be a fixed time limit for closed records. Personnel records, if saved, should be closed for 75 years, or until the death of the individual. Other closed records should be closed for no more than 10 to 25 years.

The following access policy is used by the General Commission on Archives and History:

1. Researchers need to contact the General Commission on Archives and History in order to arrange their visit.

2. Administrative records of a general agency are closed for a twenty-five (25) year period. Agency personnel files are closed for a seventy-five (75) year period. Non-agency collections are governed by their individual restrictions. For individuals wishing to look at more current documents, an appeal, in writing, must be made to the Archivist at the General Commission on Archives and History.

3. Permission to quote from material in our collections must be obtained by the researcher from the General Commission on Archives and History. The researcher is responsible for compliance with all copyright regulations.

4. Permission to photocopy depends upon the condition of the material and the number of items requested. There are photocopying charges. All reproduction will be done by the archives staff.

The Use Policy describes what the researcher is allowed to do with the records once access has been gained. It discusses how much material can be used at any given time; whether photocopying is permitted; proper procedures for getting permission to quote or otherwise use the material; whether coats, packs, cases, or purses are allowed in the reading room; and, of course, prohibits food and drink in the archives. This document can also list photocopying and other reproduction charges, though that is perhaps best left to a separate handout. The Use Policy is the conference archives’ most “practical” document. It details the expectations of researchers’ behavior and states what the commission will permit to be done to its material. While you may wish to leave the actual crafting of this document to your archivist, the commission should be aware of, and give approval to, its contents. The General Commission’s policy is as follows:

Policy on the Use of Records

1. One volume or one container of records will be issued to each patron at one time. When the use of that volume or box is completed it will be returned to the reference desk and another volume or box obtained. A patron may request more than one container or one volume; these will be held at the desk with only one container or volume in use at a time.

2. When the patron has completed his or her work or is leaving the room temporarily the container or volume shall be returned to the person in charge.

3. Manuscripts may not be marked or otherwise altered or defaced.
4. Only pencils may be used when taking notes.

5. All manuscripts and volumes are to be placed on the tables. They are not to be held in the lap or propped against the edge of the table.

6. Only one container or one folder of loose papers may be opened at one time in order to avoid mixing.

7. Papers are not to be rearranged under any circumstances. If a patron thinks something is out of order, she or he should call it to the attention of the archivist.

8. Brief cases, coats, notebooks, envelopes, and folders may not be taken into the Research Room. They will be stored in lockers.

9. Smoking, eating, or drinking is not permitted in the Research Room.

10. The patron is responsible for compliance with all copyright regulations.

11. Anyone who violates these regulations may lose access privileges to the Archives.

I agree to abide by these regulations.

_____________________________________________________________
Name

Job Description

A job description for the archivist is a useful and necessary tool. If your conference has a personnel manual or list of jobs, then it is wise to get your archivist’s job description included in that manual. The job description, like your collection policy statement, needs to be specific enough to give the archivist direction in doing her or his task and to allow you to have a reasonable gauge of job performance, but should avoid being too prescriptive (e.g. archivist must turn out lights when leaving at end of the day).

The job description should also state some of the important job qualifications you want your archivist to have. It should include qualifications, relationship to the conference structure and staff, expected general archival duties (e.g. acquiring, processing, and managing collections and record groups in an approved archival manner; creation of finding aids), the type of reference work expected (e.g. dealing with conference offices, genealogies, general research, technical preservation, or conservation matters from the local church). The job description will vary according to your local needs and should be flexible enough to accommodate change and growth in the archives program. It should be reviewed often.

Even if the archivist is employed by a local college or university it is wise for the commission to create such a document, if for no other reason than to be able to have informed discussions and
negotiations with the school when necessary. The example below should not be thought of as comprehensive, but rather as a starting point.

**TITLE:** Archivist

**REPORTING RELATIONSHIP:** Commission on Archives and History

**PRIMARY RESPONSIBILITIES:**

- Administer the conference archives: develop/implement records management plan for conference agencies, offices; solicit/receive collections; arrange/describe collections; create finding aids.

- Administer reference service: provide research assistance to conference staff, local church historians, family historians, others; assist local churches in establishing and servicing congregational archives.

- Administer routine activities of the commission: prepare for meetings; prepare mailings of notices, membership lists, minutes, etc.

- Administer special activities and projects of the commission: preparing publications; naming/marking historic sites; organizing workshops, tours, etc.

- Represent the conference’s archival interests in United Methodist connectional activities, particularly the [name of jurisdictional Commission on Archives and History or historical society].

- Represent the conference and denomination in regional archival circles, particularly organizations and gatherings of archivists of religious institutions.

**QUALIFICATIONS:**

- Certification by the Academy of Certified Archivists OR bachelor’s degree plus advanced archival training either in a master’s degree program or archival workshop OR bachelor’s degree plus two years or more of archival work experience that encompasses both processing and reference service.

**HOURS:** [list number of hours per week ]

**Deed of Gift**

A variety of forms are needed in an archives. The design of some, such as the accession register, are best left to the archivist. However, the donor form, or *deed of gift*, should be designed by the commission and reviewed by the conference’s legal counsel before it is put to use. A *deed of gift* is used when someone gives personal papers or items to the archives. It provides for the complete transfer of ownership to the archives. Such a change in ownership is necessary in order
for the archives to make the collection available to the public in a timely and convenient manner. Before any gift is formalized, the archives should provide potential donors with information about the implication of their gift. The Society of American Archivists has prepared a helpful brochure for donors (see p.19 for address).

**Note:** a *deed of gift* is **never** used with conference records. This is because all records created by any conference agency are owned by the conference, not any individual, and the records are not *given* to the archives. Rather, the custodianship of the records is transferred from one agency to another, as provided by *The Book of Discipline*.

The following form is used by the General Commission on Archives and History:

---

**CERTIFICATE OF GIFT**

Name: 

Address: 

City: 

State & Zip: 

conveys without reservation to The General Commission on Archives and History and its successors and assigns the following materials:

(Description ) (Or, see attached)

---

as an unrestricted gift, and transfer(s) to The General Commission on Archives and History all legal title, copyright, literary property rights, and all other rights in the materials I/we hold
in them except as noted below; the said gift to be administered by The General Commission on Archives and History.

(Restrictions or exceptions, if any)

I/we agree that any items in the materials described which are believed to be inappropriate to the holdings of The General Commission on Archives and History shall be disposed of by the Archivist/Records Administrator as he/she sees fit.

The General Commission on Archives and History in return undertakes to house, care for, and otherwise administer these materials in the best interest of impartial scholarship, subject to the conditions specified above.

Signature of donor(s) ___________________________________________ Date

__________________________________________ Date

Title (if rep. of organization or business) __________________________________________

Signature of Archivist __________________________________________ Date

Date of receipt of gift __________________________________________

The commission needs to address the relationship of the archives and the archivist to the conference. The two major issues are where will the archives be housed and who will employ the archivist. Three different arrangements exist in Annual Conferences across the denomination:

✧ The conference provides space for the archives (usually in the conference office) and hires the archivist.

✧ The conference contracts with a local college (usually the conference school, but not always) for storage space and the college provides the archivist. In this case the conference needs to reach an agreement with the college on costs, storage of archival materials, access to the collection, and the amount of time the college’s archivist will be assigned to work on the collection. Often the commission’s original wishes may need to be modified during the negotiations, so it is important to have a preliminary collection policy and job description in place. If such a relationship already exists
then it is necessary to review the contractual arrangement on a regular basis as well as to maintain open communications between the conference and the school.

Often the archives is stored at a local college and the archivist is employed by the conference and *allowed* to work with the collection. While this type of arrangement is necessary in some cases, it is not ideal; the lines of responsibility are too easily blurred and confused.

As you think about storage space for the archives, consider the following:

1. General considerations for archives facilities:
   a. The archives should be located in a fire-resistant or fireproof building and equipped with fire extinguishers.
   b. Temperature and humidity conditions should be maintained as constant as possible. Since most archives store many different types of material together, each with different optimum storage conditions, it will be impossible to provide ideal conditions for all material. Suggested ranges: Temperature: 60-70°F (16-21°C). Relative humidity: 40%-50%.
   c. The doors to archives areas should have locks; access to keys should be strictly limited.
   d. The archives should be equipped with a heat and smoke detector system and preferably a water detector system.
   e. The archives should be protected by a security alarm system.
   f. If there are windows in the archives, they should be covered with ultraviolet screening and heavily curtained.
   g. If fluorescent lighting is used in the archives, it should be covered with ultraviolet filter screens, particularly in display areas and areas in which archival material is stored on open shelves.
   h. The archives should be located near a loading dock.
   i. The archives should be located near running water.

2. Considerations for a reading room where access and use may be supervised and restricted:
   a. The reading room should be near the stacks.
   b. The reading room should accommodate several users.
c. The reading room should be well lighted and appropriately furnished for quiet study. The furniture should not have places where persons can conceal archival material.

d. The reading room should also contain guides to the collection; a desk and chair for supervisory personnel; an area for checking book bags, briefcases, and coats; and an area for registering visitors.

3. Considerations for other area requirements:

a. Archives require a stack area where access can be limited to archives personnel. The size of the stacks will be determined by the present size of the holdings and the number of annual accessions.

b. An area must be provided for processing unorganized collections. This area should be separated from both the reading area and the stacks. A regular office may serve this function. It should have shelving, a large flat table, a chair, and enough space to accommodate the staff and supplies used for processing.

4. Equipment

a. Shelving should be provided for present holdings plus five years’ projected accessions.

b. Shelving should be metal with adjustable shelves of adequate width and load-bearing capacity.

c. Special storage equipment for oversize items such as large photographs, maps, and blueprints should be provided, as well as appropriate filing cabinets as needed.

Resources to accomplish the task:

Membership in various professional organizations will give you access to published resources and training opportunities.

The Society of American Archivists, 527 S. Wells Street, Chicago, IL 60605 (313) 922-0140. info@archivists.org • www.archivists.org Visit on-line bookstore. Titles published by the SAA include:

Keeping Archives, edited by Judith Ellis (now on Amazon)

Developing and Maintaining Practical Archives, by Gregory S. Hunter

Archival Fundamentals Series II
Managing Archival and Manuscript Repositories, by Michael J. Kurtz
Understanding Archives and Manuscripts, by James M. O'Toole and Richard J. Cox
Selecting and Appraising Archives and Manuscripts, by Frank Boles
Preserving Archives and Manuscripts, by Mary Lynn Ritzenthaler
Arranging and Describing Archives and Manuscripts, by Kathleen Roe
Providing Reference Services for Archives and Manuscripts, by Mary Jo Pugh
A Glossary for Archivists, Manuscript Curators, and Records Managers, compiled by Lewis J. Bellardo and Lynn Lady Bellardo

The American Association for State and Local History, 1717 Church Street, Nashville, TN 37203-2991 615-320-3203; FAX (615) 327-9013: history@aaslh.org • www.aaslh.org/
Visit on-line resources. The AASLH publishes a wide range of books, pamphlets, and technical leaflets that address a wide range of issues in the historical community, including archival management, oral history, fundraising, public relations, collection care, and exhibit design.

State, county, and other regional historical organizations frequently provide training and resources for archival management. Contact your local library or historical society for further information.

The General Commission on Archives and History offers occasional skill-building workshops for archivists. Workshops are publicized online at www.gcah.org.

Sources for archival supplies:

Conservation Resources International, Inc. Telephone: 800-634-6932
8000-H Forbes Place, Springfield, VA 22151 FAX: 703-321-0629
www.conservationresources.com

The Hollinger Metal Edge Telephone: 800-634-0491
9401 Northeast Dr., Fredericksburg, VA 22408 FAX: 703-898-8073
hollingermetaledge.com

Archival Methods Telephone: 866-877-7050
Rochester, NY FAX: 585-334-7067
www.archivalmethods.com

University Products, Inc. Telephone: 800-628-1912
P.O. Box 101, 517 Main St., Holyoke, MA 01041 FAX: 800-532-9281
www.universityproducts.com
In order that our future may have a past, we need to be concerned about preserving the records of today. Preservation and selection of current records is the heart of a records management program.

A records management program is much broader in scope than an archives administration policy administered by a conference commission. Records management provides directives to manage records from the time of their creation through their distribution, use, retention, storage, retrieval, protection, preservation and ultimate disposition. Within the context of records management policies, archives administration procedures would activate as a result of retention schedules identifying the permanent non-current records and papers.

Needless to say, such a program, to be successful, involves a premium commitment of time on the part of conference staff (both paid and volunteer), and the design and receipt of a budget to assure the completion of the tasks assigned both to keep current and active records in a professional way with the application of filing techniques, forms analysis and correspondence management; and to prepare the records for their proper and legal destruction and/or their permanent retention storage and preservation in an archives under the supervision of the conference Commission on Archives and History.

Your conference Commission on Archives and History can be instrumental in creating a conference-wide task force to study the feasibility of establishing a records management program to select what facets are best suited to manage the records of the Annual Conference. Such a task force will involve representatives of the major records creators of the conference. This includes the cabinet, the full time conference staff, the standing boards and commissions as well as the directors of benevolent homes and camps. However, the most important resource persons on this task force will be lay persons presently working within the bounds of the Annual Conference as professional records managers. In this way, the unmistakable need dialogues with professional expertise. As a result, the task force will generate a procedures policy to address all segments of records management including the writing and enforcement of retention schedules for all conference records.

The General Commission on Archives and History functions as a clearinghouse to keep the various Annual Conferences informed of the up-to-date activity among the Annual Conferences currently designing a program. The General Commission has created guidelines for establishing a conference records program. You may either go to the General Commission’s website at http://www.gcah.org/RetSched.htm for a free download or contact the commission to purchase a copy of these guidelines, titled *Guidelines to Managing Records for the Local Church and Annual Conference*. However, each conference is responsible for its own program.

Resources for records management:

Contact Association of Records Managers and Administrators, Inc., 13725 West 109th Street, Suite 101, Lexena, Kansas 66215. Telephone: 800-422-2767; Fax: 913-341-3742; E-mail: hq@arma.org;
http://www.arma.org. This association can provide you with the most current bibliography for reading as well as information about a correspondence course on records management.

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**LIBRARY GUIDELINES**

Each Annual Conference should establish a library as part of its historical center at the conference office or at the site of its archival depository. A full-scale United Methodist research library ought not be attempted. Within the boundaries of each jurisdiction, the libraries of the several United Methodist theological seminaries, colleges, and universities fill this need. Commission members and staff should be acquainted with those collections and know how to refer persons to those libraries for assistance. If your conference archives is housed at a college or seminary, your library needs will be different than for an archives housed in a conference office.

Whatever your circumstances, the following guidelines can help you design a coherent library collection policy:

There are several important denominational resources:

✓ *The Book of Discipline* and *The Book of Resolutions*. Try to acquire these materials for all of the predecessor denominations that were active in your conference as well as for The United Methodist Church.

✓ *General Minutes of the Annual Conferences of The United Methodist Church*.

✓ As space or need allows, General Conference journals and the *Daily Christian Advocate*. Try to acquire these materials for all of the predecessor denominations that were active in your conference as well as for The United Methodist Church.

It is also essential to collect those publications that document the history of your Annual Conference (and its predecessors). These include:

✓ histories of your Annual Conference and region, including regional studies written by secular historians.

✓ journals of your Annual Conference and its predecessors.

✓ journals of Annual Conferences contiguous to yours. It is not necessary to collect full sets of all Annual Conference journals across the denomination.

✓ also, books written by and about episcopal leaders, clergy, and laity in your Annual Conference and its predecessors.
Periodicals are an invaluable resource, providing detailed information about the ministries of your Annual Conference and its churches that often is not available anywhere else. Titles to collect include:

✓ your Annual Conference newspaper. This is a must!

✓ denominational magazines and periodicals, if space and need permit. Some titles are *Newscape*, *Interpreter*, *Circuit Rider*, *Methodist History*, *New World Outlook*, and *Quarterly Review*.

✓ journals and newspapers of historic interest, if space and need permit. For your information, the following are available on microfilm:

- *Christian Advocate* (New York), [Methodist Episcopal Church]
- *Christian Advocate* (Nashville), [Methodist Episcopal Church, South]
- *Methodist Recorder* (Baltimore), [Methodist Protestant Church]
- *Evangelical Messenger* (Cleveland), [Evangelical Association/Church]
- *Religious Telescope* (Dayton), [United Brethren in Christ]

Finally, it is your responsibility to encourage every local church in the Conference to send your library a copy of its most recent history, yearbook, directory, and charge conference report, as well as any previously published copies that may be available.

Through GCAH’s website and other channels, let your needs for specific items be known. In turn, publicize lists of duplicate items you are willing to share with others. Consider working with other persons in your jurisdiction to arrange an exchange program.

For further information in implementing your development policy, write the Librarian on the staff of the General Commission on Archives and History, P.O. Box 127, Madison, NJ 07940-0127. The librarian can help you locate sources, addresses, prices, and other information.

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**EXHIBITS**

You may wish to develop exhibits at the archives, conference headquarters, or other denominational locations. You may also be asked to do an exhibit for Annual Conference, a local church’s anniversary celebration, or another special event.

You do not have to spend money or be an expert technician to create a good exhibit. The smallest one-case exhibit can be very successful if it makes the artifacts on display relevant to the visitor. A good exhibit stimulates the imagination and challenges the intellect. It uses basic facts (names, dates, and places) as the building blocks of historical interpretation: comparison, contrast, insight, explanation, and evaluation.
The first step is deciding what story to tell. You may decide to display a collection of photographs, commemorate a specific United Methodist anniversary, or profile women clergy in the conference. The choice of theme depends on the strengths of the collection and the needs and interests of your audience.

How can items from the collection (documents, photographs, books, newspapers, artifacts) tell the story in a creative way? A saddle bag is more than a saddle bag. Who used it? Why was it used? What was its function? What does it tell us about its owner?

Labels are a vital part of the exhibit. They are the visitor’s main source of information and interpretation. Objects seldom speak for themselves. They must be placed in some sort of historical and cultural context; this is the function of the labels.

A label should be readable! Use short declarative sentences. Keep your longest labels shorter than seventy-five words. Avoid the passive voice or convoluted language. Make your language specific and personal. For example, a label accompanying a saddle bag might read: “Saddle bag used by John Smith, a circuit rider in western Kentucky.” However, a visitor would learn much more from a label which reads: “A circuit rider was always on the road, never stopping long in one place. His saddle bag was his suitcase, library, bank, and closet, convenient enough to carry on horseback. John Smith traveled his 400 mile circuit in western Kentucky from 1820 to 1840 with his horse and this saddle bag his constant companions.”

As you ready the exhibit, remember the old adage that less is more. Don’t clutter the case(s) with artifacts or labels; visitors will be confused, not impressed. The eye travels most naturally from left to right. Remember this as you decide on the placement of the exhibit items and the labels. Balance creativity and artistic impulses with logic and practicality.

Consider the effects of light, dust, handling, and other environmental factors on the display items. Do whatever you can to protect fragile and valuable artifacts. In the case of documents, you may wish to display a good-quality photocopy instead of the original. With rare or very fragile photographs, consider having duplicates made by a professional photographer. Use archival quality (acid-free) mats with documents and photographs. Avoid the use of tape, paper clips, or other visible fasteners when placing labels in the case(s).

If you do not have any exhibit cases, or if you are designing a table-top exhibit for a meeting or special event, try to make sure that the material will be as safe as possible from inquisitive hands, cups of coffee, cookie crumbs, bright lights, dirt, and smoke. You do not want to put barbed wire around the exhibit, but it is important to take sensible precautions. In these instances especially, consider using reproductions instead of originals.

The American Association for State and Local History has many helpful publications for persons doing exhibits on a shoestring. Write for a catalog: 1717 Church Street, Nashville, TN 37203-2991 615-320-3203; FAX (615) 327-9013; history@aaslh.org • www.aaslh.org.
An oral history project is an exciting way to preserve the personal stories of women and men and give them the chance to tell you “what it was really like.” Thanks to modern technology - tape recorders and video cameras - future generations will hear people’s words in their own voices, with the shading, nuance, and emphasis that give language its emotion and richness. In the process, you will be adding invaluable data to your conference archives.

An oral history project can be a brief, one-time effort. An anniversary celebration, the installation of a new seminary president, or the dedication of a conference camp are events that draw large numbers of people who may be willing to spend thirty minutes with an interviewer. It is more likely, however, that you will want to do some in-depth interviews with selected subjects. This may well be a long-term project requiring some special funding for equipment and training.

How to begin? First, you will need to answer some basic questions. Who should you interview and why? What are the goals of the oral history project? How will it be funded and what will be the end result? What is the timeline for the project? Who will do what tasks? A good oral history project needs solid, thorough planning.

Set goals for each interview: What should the interview accomplish? What issues should the interview address? What will this interview add to the historical record?

Next, recruit your interviewees. You may wish to concentrate on retired clergy, but consider including lay persons who have been active in the Annual Conference. Missionaries and deaconesses, clergy spouses, and “pioneers” (first Hispanic clergyperson, first male clergy spouse, first youth delegate to General Conference, etc.) are all appropriate subjects for interviews. Make the initial contact by letter, if at all possible. Outline the purposes of the oral history project and give some details about the process, particularly what is expected of the subject. Follow-up with a telephone call. This allows each person to react to your letter and ask questions about the interview.

It is imperative that you know your history! With good preparation, you can ask pertinent questions, untangle inconsistencies, and confidently guide the interview. Your own conference archives has resources which will be useful in your preparation, particularly Annual Conference journals and Annual Conference newspapers. For persons who have served the general church as missionaries, bishops, or other prominent positions, you may wish contact the General Commission on Archives and History to supplement your own sources. Your subject may also have scrapbooks or other memorabilia that she or he will permit you to study in preparation for the interview.

It is also important to be well informed about the history of your town, your region, and the country so that you can put questions into historical context. Begin the interview by simply stating your name, the date, the subject’s name, and the general subject of the interview (Rev. Jones’ career in the ministry, for example). The first questions should be easy ones, such as date and place of birth, family background, and so on. Ask one question at a time, and give the interviewee plenty of
time to respond. Be an active listener; pick up on what gets said and ask follow-up questions. Ask questions that require more than a yes or no answer, but remember that you are in charge of the interview - don’t let the conversation get sidetracked. It is valuable to hear individual stories; it is also helpful to hear different people’s answers to the same questions. Allow your interviewee to talk about the negative as well as the positive; you want a full picture of a situation, not just “happy history.” Try to strike a balance between personal reminiscence, opinion, and fact.

The interview process is a sensitive one. The person you interview may reveal more than she or he intended; it is good to feel so comfortable that you both forget the tape recorder is on, but make sure that the interviewee is aware that the conversation will be preserved for others to hear. Avoid “off the record” comments.

Oral history and printed resources complement each other, and tape-recorded recollections often contain information not found in the written record. However, all documents have strengths and weaknesses as tools for reconstructing the past. An oral history interviewer has a special responsibility to the historical record, for he or she is helping to create an historical document. It is important, then, that the interviewer’s attitudes, opinions, and feelings be kept out of the interview process.

**Technical Details**

Test your equipment before going to the interview and again after you arrive. If you are using an outside microphone, do not pass it back and forth while recording. Use good quality, sixty-minute cassette tapes. Longer tapes are more likely to break, and shorter ones do not provide enough time on each side. Remember that cassette tapes have a few seconds of “lead time,” so do not begin recording the moment you turn on the machine. When a cassette reaches the end of a side, turn it over to side two without rewinding it. Store the cassette in its case to protect the tape from dust. Never use the same tape for interviews with more than one person or for more than one session of an interview with the same person. Label the tapes: write the narrator’s name and the date on each side of each tape (for example, “Josephine Brown, October 16, 1999, tape 1, side 2.”) If one side of a cassette is blank, write “blank” on that side. Do not store used or unused tapes in a hot, cold, humid, or dusty place. A car’s back window or dashboard, for example, is not the best place to carry tapes to or from an interview.

Remember that an interview is not complete until you have a valid certificate of gift or a release form granting research access to the tape. An example follows this section. An interview is also not complete until a concise summary of the interview has been made. Somewhere, perhaps on the gift form, summarize the contents of the interview in a paragraph. Mention your name, the subject’s name, the date or dates of the interview, and events, times, people, and places discussed. Be specific in the description. See the example form that follows this section.

**Resources for an Oral History Project**
Oral History Association. *Oral History Review.* (a periodical)

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**Oral History Interview Summary Sheet**

**Date:** 7/12/88

**Subject’s Name:** Mary Burton

**Interviewer’s Name:** Dale Patterson

**Summary of the interview:** (mention the following - events, times, people, and places discussed)

**Tape:** 1  **Side:** 1

Childhood
Early education
College work at University of Denver

1  2

Preparation for missionary work
Overseas work in China and India (1930-1938)
Return home and further education
Work of the Board

END OF TAPE / INTERVIEW
We, the narrator and interviewer, do convey without reservation to the General Commission on Archives and History of The United Methodist Church, its successors and assigns, the tape recordings of interviews recorded on the __________ day of __________, 20_____, at___________________________________________________,
as an unrestricted gift, and transfer(s) to the General Commission on Archives and History of The United Methodist Church, all legal title, copyright, literary property rights, and all other rights, including transcription and publication rights, in the materials we hold in them, except as noted below; the said gift to be administered by the General Commission on Archives and History of The United Methodist Church.

(Restrictions or exceptions, if any)

We agree that any items in the materials described which are believed to be inappropriate to the holdings of the General Commission on Archives and History of The United Methodist Church shall be disposed of by the Archivist as he or she sees fit.

The General Commission on Archives and History of The United Methodist Church in return undertakes to house, care for, and otherwise administer these materials in the best interest of impartial scholarship, subject to the conditions specified above.

Signature of donor(s) ______________________________ Date __________

Subject

Address

Date __________

Interviewer

Address

Date __________

Title (if rep. of an organization or business) _____________________________________

Signature of Archivist ______________________________ Date __________

Date of receipt of gift __________
One responsibility of an Annual Conference Commission on Archives and History is service to its constituency - general church and Annual Conference agencies, local churches, and individuals. The extent of that service depends on several factors, particularly the size of the commission’s archival facility and the availability of staff and commission members. A prudent stewardship of time and resources is necessary; however, outreach to the community is an important part of an effective commission’s program.

**Researchers**

The most fundamental kind of outreach is providing reference services by mail and/or telephone. Several issues require policy decisions. What kinds of reference requests can and cannot be answered by the staff? How much time can a researcher expect to wait before receiving a response? Will the staff answer requests over the phone or should researchers follow up their calls with letters? Are there fees for research or photocopies? Develop a form letter or information sheet to advise users of your policies.

Elsewhere in this manual (pages 12-14) are guidelines for working with in-person researchers. The commission should also decide whether the facility will be open to the public during certain set hours, or whether researchers will be serviced by appointment only. If the conference archives are in a college library, you may wish to allow researchers to use items from your collection in the library when the commission’s facility is closed. If you allow this, make sure that all considerations (security, photocopying permission, lending privileges, etc.) are thoroughly spelled out in writing and understood by all the parties involved.

**Tours**

Tours are another way to serve the public. Groups at the local, cluster, district, and conference levels will welcome the opportunity to learn about the commission’s work and see the conference archives. Confirmation classes, Sunday school groups, local church historians, women’s and men’s groups, and pastors may wish to arrange tours. Other groups should also be considered: high school history clubs, college classes in local history or American religion, public librarians, and genealogists will be interested in the archives.

Tours should be scheduled in advance, and it is usually best to limit the group to twenty people or fewer. If your facility is very small, you may choose to limit the group to five to ten people. Explain the work of the commission, describe the archives, and encourage discussion about the importance of keeping good records.
You may also wish to schedule some special events at the facility. Consider opening your doors to a meeting of United Methodist Women, a senior citizens’ discussion group, or a seminary class session on church history. Area historical societies and libraries, high school history clubs, and college classes in state or local history may be very interested in developing programs in conjunction with the commission. The religious heritage of a community is a vital part of its history, and you have resources not found in other area repositories. Any time the facility is open, a staff or commission member should be present.

Many conference commissions plan one or more day trips each year to Historic Sites or Heritage Landmarks within the conference boundaries. Some commissions arrange extended tours, even to Wesley country in England. Often the tours are done in cooperation with other agencies of the Annual Conference and have additional purposes such as seeing mission projects or general agencies at work.

Local church history is a vital part of our heritage. However, local church historians often work without adequate funding or recognition. The job is often thankless and lonely. The Annual Conference commission has the critical role of offering encouragement, training, and fellowship for local church historians.

Frequent communication with the local church is vital! Tell historians about resources that will help them do their job. Each quadrennium, Cokesbury publishes Guidelines for the Church Historian. You may wish to purchase a quantity to sell to local churches. The General Commission publishes a number of resources specifically for the local church, and depends on the Annual Conference commission to help publicize them.

The commission should also serve as an information clearinghouse for local church historians. When you learn of helpful books, videos, or magazine articles, save the information. Interpreter magazine often includes a church history “Idea Mart” column; since historians may not see every issue, you may want to keep a reference file at the archives.

The Annual Conference commission should also try to work with pastors, particularly in those churches where there is no historian or Committee on Records and History. Perhaps you can meet with pastors at their district meetings and explain the local church’s disciplinary responsibilities for archives and history. It is important the local churches know that you count on them for vital information and records.
The local church historian looks to the Annual Conference commission for skills training. Plan workshops that address such topics as archival management, celebrating a church anniversary, oral history, women’s history, disaster prevention, writing a local church history, and research techniques. Many Annual Conference commissions schedule workshops at the district level to encourage maximum attendance with minimal travel.

Consider publishing booklets or articles on issues of special concern in your Annual Conference (such as how to preserve records in a humid climate or where to locate genealogical records in your region). Review ¶247.5 in *The Book of Discipline* which lists the local church historian’s duties; this may help you decide training and informational emphases. Remember, too, that the Annual Conference commission’s participation is required if a local church is interested in applying for Historic Site status as outlined in ¶1712.1a and on pages 41-42 of this manual.

Workshops provide opportunities for fellowship and communication. Other events that help build community are tours of Historic Sites or social events at the conference archives (or at locations in several districts). Encourage phone calls, letters, and personal visits between conference commission members and local church historians. When possible, commission members should attend local church heritage events in their districts.

Participation in the wider historical community is also important. Invite local church historians to join your conference, area, and/or jurisdictional historical society (or similar organization), the Historical Society of The United Methodist Church, and local groups such as genealogical societies and historic preservation groups.

By encouraging local churches to recover, preserve, study, and celebrate their history, you provide an invaluable service to the whole church. The history of the local church is the foundation of our heritage, and the Annual Conference commission’s support of that history is indispensable.

The commission should be an active part of its Annual Conference. Among the ways to emphasize archives and history in the Annual Conference are articles for the conference newspaper, a conference-wide writing contest, or a yearly award for the best local church history. When your Annual Conference selects a program or mission emphasis (such as evangelism), consider ways that the commission can participate. Be sure to publicize and report on heritage events, workshops, and publications through your conference communicators.

It is the commission’s duty to insure that Annual Conference leaders know about their responsibilities in the area of archival management and preservation. Some Annual Conference
commissions write personal letters to District Superintendents and/or meet with them to review the appropriate disciplinary paragraphs.

**History at the Annual Conference session**

Your commission should cooperate with the conference Program Committee to provide an historical hour or other programming on the history and heritage of United Methodism at each session. This responsibility is given to the Annual Conference commission in ¶641.1 of *The Book of Discipline*. This program may range from a few moments to a full dramatic or musical production at an evening session. Some commissions use this time to recognize persons marking a 25th or 50th year in the ordained ministry. Others honor churches celebrating significant anniversaries, or present grave markers (available from Cokesbury) to families of deceased clergy. The commission should anticipate major historical anniversaries several years in advance and prepare appropriate programming.

In some conferences, the commission shares responsibility for the memorial service for deceased clergy and their spouses. Special care should be given to this service. Families of the deceased should be encouraged to attend and be recognized appropriately. To recall and celebrate the service of persons in the past is to be aware of our heritage in a meaningful way.

**Preparing memoirs for the Conference journal**

The Secretary of the Annual Conference is usually responsible for assigning and collecting memoirs. However, the Annual Conference Commission on Archives and History can help ensure accurate and historically valuable memoirs by urging the Annual Conference to adopt official guidelines for memoirs. These guidelines may then be published in the Annual Conference journal or circulated to authors of memoirs:

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**Memoirs in Annual Conference Journals**

**Suggested Guidelines**

*What is a Memoir?*

A memoir is an account of each deceased individual who has served the church as a clergyperson, clergy spouse, or lay member of the Annual Conference. The account must be accurate without being dry, and both brief and comprehensive.

The memoir is *not* designed to be either a eulogy or a memorial sermon. Yet, when created skillfully and sympathetically, this brief and specialized biographical account can be a document suitable both as an historical record and a synoptic portrayal of personality and spirit.

Once the memoir is published, persons will use it as an historical resource. They will expect it to be authentic and accurate.

*Sources of Information:*
The family is the most important source. An interview in person or by letter can provide the most detailed and interesting data. Be sure to verify dates and places as necessary.

Another source is the newspaper account. An obituary is especially valuable if the deceased has died in a retirement area far from the Annual Conference.

The Conference Secretary or the Annual Conference office may have pertinent information on file about conference clergy members.

Conference journals from past years generally contain lists of appointments for all clergy members, along with academic and honorary degrees earned by the deceased.

The conference or general church Board of Pensions may have information.

If the deceased lived in a retirement home, the office will have biographical information as well as names and addresses of family members.

Friends of the deceased may be able to give information; however, this material should be used selectively, with careful attention to accuracy.

When the memoir is completed, it is wise to ask the next of kin to verify the contents before publication.

The Substance of a Memoir:

The following items are usually considered essential elements of the memoir. Although the order of these items may vary, the arrangement presented does suggest that there is reference value in having a basically uniform pattern.

1. Personal (early period)
   The complete name of the deceased; date and place of birth; the name of father and mother (including mother’s maiden name in parentheses).

2. Educational
   a. Schools and colleges attended with the appropriate years noted.
   b. Degrees and honors received with the date of each.

3. Ecclesiastical
   a. Dates of baptism, conversion, first church membership, call to ministry.
   b. Dates of ordination.
   c. Appointments served, with names of cities, states, and conferences as necessary for clarity.
   d. Special areas of service and responsibility; notable accomplishments and recognition given; service on conference and community boards and agencies.
   e. Retirement date (if deceased had retired); residence following retirement; unusual services rendered following retirement.

4. Personal (late period)
a. Date of marriage; name of spouse (including maiden name); names of children (including married names and addresses); date of spouse’s death if widowed; address of surviving spouse or nearest relative.
b. Special lifelong interests and avocations.
c. Date and circumstances of death.
d. Date and place of funeral; place of burial; names of officiating clergy.

The Style of a Memoir:

✎ The style of every memoir should reflect proper English usage. Simplicity and good taste are essential. There is absolutely no place in the memoir for sentimentality, triteness, the so-called “flowery style,” sermonizing, or an excessive use of adjectives.

✎ The completed memoir should be typed, double spaced on good quality paper. The name of deceased, as commonly known, should appear at the top of the page in capital letters and underscored once. The original copy should go to the conference Secretary. Give one photocopy to the printer of the conference journal; another to the family; and a final copy should be retained by the writer for his or her own file. The memoir should be completed in final form and all copies sent to the proper places within one month after the death of the subject. Immediacy helps accuracy!

✎ If the conference necrologist or historian writes the memoirs, his or her name should not appear as author because that person’s position and responsibility are a matter of conference record. However, if a family member, pastor, or friend writes a memoir, it should be signed by the writer, whose name should appear immediately following the memoir in the journal.

✎ A good quality black and white photograph should be given to printer to be published in the conference journal. The local source for the photograph is the family or the church where the deceased worked. The best place for the photograph is next to the memoir. If another arrangement is used, there should appear, directly below the photograph, the name of the deceased and a notation indicating the page number of the memoir. If the treasured photograph has been loaned by the family, take care to return the photo, unharmed, as soon as possible after the journal is printed.

Writing an Annual Conference History

Every Annual Conference needs an up-to-date published history. If the commission decides to sponsor such a project, you will need to address the following concerns.

Begin at the beginning: The project needs the approval and support of conference leadership, including the bishop, the lay leader, the chair of the Council on Finance and Administration, and presidents of conference-wide organizations (such as United Methodist Women and United Methodist Youth Fellowship).
The commission will need to form a project committee that is broadly inclusive of lay, clergy, youth, women and men, and persons from the racial and ethnic heritages represented in the conference. The committee should also include the writer(s), editor(s), and principal researcher(s).

The commission should have a well-developed plan for conference approval that includes a budget and a timeline. Among the decisions to make early in the process:

**The format:** Hard or softcover? Primarily text, primarily photos, or something in between? Will this history update an earlier work or be a brand-new effort?

**Deadlines:** When will the research be finished, the first draft written, editorial suggestions made, the fact checking completed, the second draft written, additional editorial work done, the photos collected, the printer selected, the manuscript delivered to the printer, the finished product completed, and the event launching the book’s publication scheduled?

**The budget:** Include all applicable fees for researchers, author(s), editor(s), and reader(s), and committee meetings; publication costs; publicity expenses; and the book’s purchase price.

In the early stages, discuss what this history should accomplish. Ideally, it should faithfully record the past. It should also provide education, entertainment, and inspiration. Remember that you want to tell the story of real people’s lives, not just tabulate dry statistics and lifeless facts. You want to reveal something of the depth, complexity, and texture of church life. Researchers, writers, and editors all need to remember that their goal is to put flesh on the bare bones of history.

**Telling the story:** As the author(s) and editor(s) organize the text, they will need to decide how to tell the story. A *chronological* story (“first we did this, then we did that”) details events as they happened, but allows few opportunities for the reader to catch her breath. Nor does it give the author(s) many chances to analyze, summarize, or draw conclusions. Arranging by *topics* (bishops, missions, social outreach, education) allows for in-depth examination, but can artificially isolate subjects. One doesn’t get a feel for the variety and depth of church life, and it can be confusing for the reader to jump back and forth in time from chapter to chapter. The third option, *periodization*, is usually the most workable. When history is organized by decades or other standard blocks of time, author(s) and readers can bite off small chunks of the story, examine them, place them in context, and move on.

Placing events in context is crucial to the history’s success. It is simply impossible to understand your conference’s history without some knowledge of time, place, and people’s lives. Your writer(s) and researchers will need to understand conference events in light of regional, national, and denominational history. For example, how has the conference been affected by social change and historical events (wars, natural disasters, issues like suffrage/abortion/civil rights)? How has it been affected by economic and sociological change (immigration, the growth of suburbia, depressions and recessions)?

Another critical aspect of your history is its inclusiveness. The history of your Annual Conference is the history of all of its people: lay and clergy; men, women, and children; the elderly and youth; clergy and clergy spouses; administrators and missionaries; persons from many racial,
ethnic, and economic backgrounds. Also remember to include all the predecessor denominations of United Methodism that are part of your conference’s history.

Remember that you are writing for the future as well as the present; identify all persons, places, and events as accurately as you can. Check, recheck, and re-recheck facts and dates! People will rely on this history for many years to come.

**Special touches:** Photographs liven up the text and provide an additional window to the past. Vignettes about people and events can be amusing, touching, and revealing; if interspersed throughout the text (perhaps at the beginning of each chapter), they complement the text and add human interest to your story.

Include information about everyday things to help paint a picture of the times (the price of postage stamps, fashion trends, favorite radio programs). These kinds of details help the reader relate to the lives of historical figures.

An index can be a very valuable part of the book, and several appendices may be useful as well (financial and membership statistics, lists of bishops, names of boards and agencies in different eras). You may also want to include a timeline listing various milestones in the conference’s history.

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**Working with . . . THE JURISDICTION**

Each Annual Conference commission should actively participate in its jurisdiction’s historical activities. The Archives and History Directory lists the various jurisdictional commissions, committees, and historical societies. Each jurisdiction is organized differently. Most meet once a year, and these meetings are valuable occasions for sharing information and building friendships. Several representatives from your commission should attend these events.

If your jurisdiction has a newsletter, be sure to contribute news from your Annual Conference on a regular basis. Whenever possible, attend events sponsored by your jurisdiction’s historical agencies. Work with your jurisdictional leadership on such matters as nominating places for Historic Site or Heritage Landmark status; planning workshops; organizing anniversary celebrations; publishing histories; and developing standards and procedures for your conference archives.

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**Working with... THE GENERAL COMMISSION**

The General Commission on Archives and History is mandated in *The Book of Discipline* to “do any and all things necessary to promote and care for the historical interest of The United Methodist Church.” The commission’s offices, a research library, and the archives of The United Methodist Church are housed on the campus of Drew University in Madison, New Jersey.
The General Commission maintains and updates a website at www.gcah.org. The website reports on General Commission activities, publicizes new resources, and announces upcoming meetings and workshops.

Periodically, the General Church sponsors training events. The chairperson from every Annual Conference Commission on Archives and History is invited to these workshops, which are led by staff of the General Commission on Archives and History. In addition, when schedules and finances permit, General Commission staff members lead workshops in Annual Conferences, Jurisdictions and Central Conferences upon invitation.

The commission publishes *Methodist History*, a quarterly journal, available as a print subscription or through the Commission web site without cost. It also offers research grants and writing awards, develops program resources, and publishes a variety of pamphlets and booklets. Contact the commission or go to our website at: http://gcah.org/resources/guidelines-and-publications for a current publication list.

The General Commission encourages you to call the offices in Madison (973-408-3189) or email us at gcah@gcah.org with your questions, concerns, and needs.

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**Working with...OTHER HISTORICAL AGENCIES**

The General Commission publishes an *Archives and History Directory*, which lists Annual Conference, area, state, and jurisdictional historical societies. Each member of the Annual Conference commission should belong to one or more of these societies, as well as the **Historical Society of The United Methodist Church**. The conference commission should also encourage local church historians, genealogists, and others to join this fellowship of persons interested in the history of the United Methodist movement. The Society publishes a quarterly newsletter, *Historian’s Digest*, and meets annually. Members of the Historical Society receive the newsletter, may include a subscription to *Methodist History* with their dues (the General Commission’s journal), and discounts on General Commission publications. For information about membership and benefits, contact the General Commission offices in Madison, New Jersey.

The **World Methodist Historical Society** is affiliated with the World Methodist Council. Its newsletter, the *Historical Bulletin*, disseminates information about the activities of Methodist and Methodist-related historical groups all over the world. For information or to join, contact the General Secretary, WMHS, P.O. Box 127, Madison, NJ 07940-0127.

The Annual Conference commission should also be aware of those historical groups outside the church which can be of assistance. County and state historical societies, genealogical groups, and preservation organizations are involved in issues that have a direct impact on your work. If
finances do not permit membership in these societies, ask that your name be placed on their mailing
lists so that you will be informed about their publications and special programs. Call on their
services and expertise as needed. Inform them about your work and invite them to your events. On
the national level, explore membership in the American Association for State and Local History and
the Society of American Archivists (mentioned on pages 19-20).

If your conference does not have an historical society, you may wish to organize one.

**Annual Conference Historical Society
Sample Bylaws**

See *The Book of Discipline*, 2016, ¶641.2, for enabling legislation.

**Article I. NAME**
The name of this organization shall be the [Conference name] Conference United Methodist Historical
Society, hereinafter called “Society.”

**Article II. PURPOSE**
The Society is formed for the following purposes:
1. To work with the Annual Conference Commission on Archives and History in the
collection and preservation of materials related to the history of The United
Methodist Church and its antecedents.
2. To promote research, writing, and publication in the field.
3. To locate and support the preservation of appropriate sites of historical interest
within the conference.
4. To develop interest in United Methodist history and skills for pursuing it among
local church historians and others.
5. To develop and promote observances of historical anniversaries and other
events of interest.
6. To engage in such other activities as shall be deemed proper.

**Article III. CONSTITUENCY AND MEMBERSHIP**
The Society shall associate itself in cooperative ways with the Annual Conference Commission on
Archives and History, as well as the Jurisdictional and General Commissions on Archives and
History, and the Historical Society of The United Methodist Church.

Membership in the Society shall be based upon payment of annual dues and shall be derived from
the following sources:
1. Members of the Commission on Archives and History.
2. Bishops, superintendents, and other staff persons related to the Annual
Conference.
3. Members and friends of the conference sympathetic to the purposes of the Society.
4. Persons, who, by vote of the membership, may be elected to honorary membership
without payment of dues.
Article IV. MEETINGS
The Society shall meet at least annually at such time and place as it shall determine. Special meetings may be held at the call of the president. Members present shall constitute a quorum.

Article V. OFFICERS
The Society shall elect the following officers at the regular annual meeting who shall serve until their successors are elected: President, Vice-President, Secretary, and Treasurer.

The Executive Committee shall consist of the elected officers, plus the chairperson of the conference Commission on Archives and History. The Executive Committee shall meet at the call of the president of the Society, or any two other officers.

Article VI. ADMINISTRATION
Section 1. Management of the Society shall be vested in the Executive Committee.
Section 2. The operating budget of the Society shall be proposed by the Executive Committee at the annual meeting for approval, together with a recommendation of the amount of annual dues.
Section 3. The Executive Committee shall name a committee of three persons to prepare nominations for all elective offices to be acted upon at the annual meeting.
Section 4. The Executive Committee shall regulate its own meetings, temporarily fill vacancies and prescribe the various duties of the officers of the Society.
Section 5. Annual meetings and other events of the Society shall be held at an appropriate time and place agreed upon by the Executive Committee.
Section 6. All materials collected, unless otherwise stipulated, shall become the property of the conference Commission on Archives and History and be placed under the charge of the custodian in the Annual Conference depository.
Section 7. The Society shall be amenable to the Commission on Archives and History of the Annual Conference in all matters relating to its organization and operation.

Article VII. AMENDMENTS
The bylaws shall be approved by the Society and may be amended by a vote of two-thirds of the membership present and voting at a properly called meeting, providing that such proposed amendments are circulated to the membership not less than two weeks prior to the meeting.

Article VIII. PARLIAMENTARY AUTHORITY
Robert’s Rules of Order Newly Revised shall apply in all circumstances where it is not in conflict with The Book of Discipline, actions of the Annual Conference, or these bylaws.

An Historic Site is a location or structure associated with an event, development, or personality deemed of strong historic significance in the history of an Annual, Central, or Jurisdictional Conference. Historic Sites are designated by formal action of the Annual, Central, or Jurisdictional Conference within whose region the site is located.

The effort to designate an Historic Site is not a casual one. The case for historicity, maintenance, and use must be well established. The General Commission on Archives and History counsels that the designation be bestowed sparingly, after careful investigation and research. Inquiry should be made into such pertinent factors as present ownership, maintenance, and accessibility for those who may wish to visit.

The commission further recommends that a painstaking effort be made to collect and preserve substantive proof of the site’s history, such as books, pamphlets, maps, pastoral and church records, journals, letters, periodicals, photographs, and personal memorabilia. Copies of these materials should be deposited in the conference archives.

**The Process:** A local church, a group, or an individual may initiate the process, but the Annual Conference Commission on Archives and History (or equivalent) must become involved at an early stage. Only the Annual Conference commission can make the formal recommendation to the Annual, Central, or Jurisdictional Conference.

1. Download an application (http://s3.amazonaws.com/gcah.org/Historic_SiteApplicationPDFForm.pdf) and the guidelines (http://s3.amazonaws.com/gcah.org/Historic_SiteGuidelines.pdf) in PDF or request an application form for registering a United Methodist Historic Site from the General Commission on Archives and History, P.O. Box 127, Madison, NJ 07940. The completed application should be sent to the chairperson of the Annual Conference Commission on Archives and History.

2. Study each proposed site objectively and in a scholarly manner. This not only involves gathering data and materials, but developing a clear understanding of the site’s significance to The United Methodist Church (or its antecedents or components) and various factors relating to its preservation, interpretation, and use.

3. The Annual Conference commission should review the application carefully. A site visit is highly desirable. If there are any questions, the application should be returned to the preparers for additional data. If the commission endorses the application, it is ready for Annual Conference action.
4. The Annual Conference commission then presents the completed form, with the commission endorsement and supported by available evidence, to the Annual, Central, or Jurisdictional Conference. The conference should vote on the application.

5. Once approved by a conference, no United Methodist Historic Site is official until it has been registered with the General Commission on Archives and History of The United Methodist Church. This requires submitting the application form, with proper signatures attesting to the favorable action of the conference. Upon payment of a registration fee, an official United Methodist Historic Site numbered marker will be issued. The registration fee is $75.00.

6. After formal registration of the Historic Site, there should be an appropriate ceremony, with representatives from historical societies as well as church groups, to mark the dedication and public presentation.

7. The General Commission requests descriptive material pertaining to the dedication of the Historic Site and later events. Programs, clippings, photographs, historic information, and other memorabilia should be forwarded regularly.

See The Book of Discipline, 2016, ¶1712.1b-d.

A Heritage Landmark is a structure or location specifically related to significant events, developments, or personalities in the overall history of The United Methodist Church or its antecedents.

Heritage Landmarks must have distinctive historic interest and value for the denomination as a whole, as contrasted with local or regional historic significance. Only those buildings, locations, or structures previously registered as United Methodist Historic Sites are eligible for consideration as Heritage Landmarks.

The Process:

1. When the decision is made to nominate an Historic Site for status as a Heritage Landmark, the Annual, Central, or Jurisdictional Commission on Archives and History (or equivalent) should request an “Application for Heritage Landmark Status” from the General Commission on Archives and History, P.O. Box 127, Madison, NJ 07940-0127 or download the guidelines and application from our website at: http://s3.amazonaws.com/gcah.org/HLApplication_for_status_Form.pdf
2. The completed application should be sent to the General Commission. Each application will be carefully reviewed by the General Commission’s Committee on Heritage Landmarks.

3. If approved, the General Commission will recommend that the Historic Site be named a Heritage Landmark by the ensuing General Conference. General Conference approval is required for all Heritage Landmarks.

4. Upon General Conference approval, the General Commission on Archives and History will contribute, if needed and requested, a one-time gift of $500 for publicity and promotion of the Heritage Landmark within the first year of designation (including a proper marker or plaque).

5. All Heritage Landmarks which receive official designation should be accessible to research and visitation, adequately maintained, and responsibly interpreted by an appropriate group in the local area in cooperation with the Annual, Central, or Jurisdictional Commission (or equivalent).

6. Each Heritage Landmark is expected to seek funding for maintenance, interpretation, and promotion from its Annual, Central, or Jurisdictional Conference as well as from appropriate constituencies in and out of the church. Each year, the General Commission on Archives and History provides very limited financial support for specific projects, solely on the basis of demonstrated need. Applications for funding are provided by the General Commission to all Heritage Landmarks. Applications must be completed and returned before the announced deadline; they are reviewed by the Committee on Heritage Landmarks of the General Commission on Archives and History.

**When should an Historic Site be considered for status as a Heritage Landmark?**

It is better to have a few Heritage Landmarks well qualified, maintained, and interpreted rather than a large number which include some of doubtful validity, poor maintenance, and inadequate interpretation. Therefore, every Heritage Landmark must have historical integrity, including authenticity, conscientious validation, sound maintenance, and responsible interpretation.

**Specific Considerations:**

✧ A place’s *significance* to the history of The United Methodist Church or its antecedents is of utmost importance. This may be augmented by other factors of interest and value to cultural, military, architectural, archaeological, and other fields of history.

A *fleeting association* with historical figures or important events does not qualify a site for major recognition. For example, the fact that Francis Asbury preached at the Lovely Lane Meetinghouse in Baltimore is not of overwhelming significance, but the fact that the Methodist
Episcopal Church was founded there is one major reason for its status as an Heritage Landmark of The United Methodist Church.

Likewise, a series of related events occurring within an approximate vicinity may qualify for recognition as a cluster Heritage Landmark. John Wesley’s American Parish in Savannah includes several locations connected to Wesley’s stay in the Georgia colony.

◊ Heritage Landmarks are often associated with specific persons important to the history of The United Methodist Church and its predecessors. Old Otterbein Church in Baltimore is associated with Philip William Otterbein, a founder of the United Brethren in Christ.

While certain individuals merit special consideration, not every prominent person can be recognized by designation of an associated Heritage Landmark. Nevertheless, an occasional representative person may be selected to epitomize a whole category of contributors to the life of The United Methodist Church. The Deadwood Cluster in Deadwood, South Dakota commemorates the life of Henry Weston Smith, murdered on his way to preach on August 20, 1876. Smith exemplifies hundreds of frontier preachers who risked their lives to spread the Gospel.

◊ Many Heritage Landmarks note a “first.” The Green Hill House in Louisburg, North Carolina, was the site of the first Annual Conference session held after the Christmas Conference establishing the Methodist Episcopal Church. The Methodist Hospital in Brooklyn, New York was the first hospital built by American Methodists. Yet the meaning of a place’s priority must be broadened by its relation to subsequent events, persons, organizations, and ideas. Being first is not enough to merit designation as a Heritage Landmark.

◊ The historical value of past events may be reinterpreted with further passage of time. An event once deemed of the highest importance may deservedly fade in significance as years go by. In order to avoid the dangers of premature designation of Heritage Landmarks the accepted policy of the General Commission on Archives and History is that an Heritage Landmark must be associated with an event or person whose major contributions were made prior to the most recent half-century.

Note: The General Commission publishes A Traveler’s Guide to the Heritage Landmarks of The United Methodist Church, which also includes a list of registered Historic Sites. Contact the General Commission for more information.
Governmental Landmarking of Heritage Sites

Paragraph 2512.7 of The Book of Discipline, 2016, requires a conference Board of Trustees to have a policy about heritage sites receiving landmark status by a government agency. Conferences may or may not have developed such a policy. The following policy was developed by the West Ohio Conference and it is placed here as a sample and with permission. This does not effect the designation of a site as a conference Historic Site or Heritage Landmark. These are United Methodist designations. The General Commission does not control decisions of a site in any way. However, if significant changes are made, the site can be de-designated as a Heritage Landmark. See the guidelines below:

There is a provision in The Book of Discipline for reclassification of a Heritage Landmark. There are at least three circumstances which could lead the General Commission to recommend such a step to the General Conference:

1. A Heritage Landmark's physical structure is changed in a way that irrevocably damages its historical authenticity.
2. The owners deliberately and permanently deny public access to the Heritage Landmark.
3. It is discovered that the Heritage Landmark does not have the historical significance originally claimed for it.

The General Commission offers the following guidelines regarding changes to the physical structure of a Heritage Landmark:

1. The change should not significantly alter the appearance (and thus the authenticity) of the Heritage Landmark.
2. Any restoration or repair work should be historical sensitive (for example, in the choice of paint colors). The General Commission objects to using unauthentic materials in restoration and repair work.
3. No ancillary buildings (restrooms, visitor's center, etc.) should be built so as to affect the Heritage Landmark's appearance on its site. Sensitivity should also be used regarding plantings; for example, trees should not be planted so that they will eventually obscure the structure.

Sample Annual Conference Landmark Designation Policy

WEST OHIO CONFERENCE
Landmark Designation Policy
This policy is established pursuant to the 2008 *Book of Discipline* of The United Methodist Church as follows –

“Establishment of Annual Conference Policy with Regard to Governmental Efforts to Designate Church-Owned Property as Landmarks – The board, after consultation with the conference commission on archives and history, or alternate structure, shall develop a policy for an annual conference response, on behalf of any local church, church-related agency, or district or annual conference board of trustees located within the bounds of the annual conference, to any governmental effort to designate a property held in trust for the benefit of The United Methodist Church (¶ 2501) by any such board of trustees as a cultural, historical or architectural landmark.” (¶2512.7 of the 2008 *Book Of Discipline*)

WHEREAS, the Conference Board of Trustees is the designated agency to intervene and take all necessary legal steps to safeguard and protect the interests and rights of the Annual Conference anywhere and in all matters relating to property and rights of property of any of its local churches and church-related agencies. (2008 *Book of Discipline* ¶¶ 2501, 2512.4)

WHEREAS, landmark designation of property by a public or governmental body, or other non-profit organization may well serve important cultural, historical, architectural or other community purposes, but it may also substantially restrain the use, transformation and transferability of any church-owned property so designated. Whether voluntary or involuntary on the part of the church property owner, landmarking thus results in a transfer or sale of property under *The Book Of Discipline*.

WHEREAS, the Conference Commission on Archives and History has been duly consulted.

THEREFORE, BE IT RESOLVED THAT, at the earliest opportunity following notification or receipt of information that voluntary or involuntary landmarking efforts may affect its property, a local church or church-related agency in the West Ohio Conference shall notify the Conference Treasurer or Conference Chancellor, who in turn shall notify the resident Bishop and the District Superintendent in whose district the property is located.

If the local church or church-related agency desires to cooperate voluntarily with landmarking its property, the church or agency shall obtain an approval vote of the Conference Board of Trustees who shall confer with the Bishop prior to or during its deliberations. The local church or agency shall then comply with the provisions on sale or transfer of property (as applicable) of *The Book Of Discipline*, including the convening of any required meeting or charge conference.

In the event of efforts to landmark involuntarily property owned by a local church or church-related agency, the Conference Board of Trustees may in their discretion assist local churches and church-related agencies in responding to such efforts, and may intervene and take such measures as appropriate to protect the interests of The United Methodist Church in the property in question.
General Overview of Landmark Designation:

Generally speaking, landmark designation seeks to preserve some historic, cultural, architectural or other similar aspect of a building or defined geographical area. Government bodies and non-profit organizations at the federal, state and local levels are involved in these efforts.

Landmarking can be voluntary or involuntary on the part of the property owner. A typical example of voluntary landmarking is when a government body and a property owner agree to preserve some architectural façade or historic feature of a building. The owner agrees to a perpetual easement restricting future use and development rights on the building and property in exchange for the governmental body’s payment of money and extension of tax credits to the owner.

Involuntary landmarking typically occurs at the state and local level when a government body designates a defined geographical area as a historic or cultural district. The restrictions on the property vary from district to district, and compliance with the restrictions can be voluntary or mandatory. In all cases, the decision on whether to permit a use or expansion request is beyond the control of the property owner. There may be tax incentives for a property’s location within a district.

Property owners may feel that landmark designation is an honor, or that a historic district or neighborhood is a positive part of urban life. However, as a practical matter, there may be many negatives to landmarking. Chief among these are the scope and nature of the restraints on use, transformation and transferability of the property.

The Legal Department of the General Council on Finance and Administration generally advises against voluntary landmarking of property owned by local churches or church-related agencies.

“In summary, church organizations need to be extremely careful before making any decision that its property would be enhanced in any way by landmark status. Landmark status may be desirable in certain limited circumstances. However, landmark status can drastically limit the availability and allocation of resources and severely restrict a church’s freedom to make its own decisions about important issues, including how it practices its faith.” (GCFA Legal Manual, V-March 18, March 2005.)

From the standpoint of property owned in trust for The United Methodist Church, landmarking may very well prevent a local church from transforming the donations given in the past into new structures or establishments for United Methodist use or enjoyment in the future. Further, the tax benefits available to private property owners are generally worthless to a church since a church does not usually pay income or real estate taxes.

Certainly, each landmarking effort needs to be assessed on its own merits, and there may be instances where landmarking is in the best interests of both the public and the church organization. However, generally speaking, landmark designation should be discouraged.
Heritage Sunday shall be observed on Aldersgate Day (May 24), or the Sunday preceding that date. The day provides an opportunity for reflection on heritage, celebration of where the Church has been, how it understands itself as it shapes us today, and the meaning of Christian conferencing. Heritage Sunday calls the Church to remember the past by committing itself to the continuing call of God.

Heritage Sunday is set aside specifically for remembering our legacy as United Methodists. As such, it is an ideal time for local churches and Annual Conference Commissions on Archives and History to develop programs and projects reflecting the importance of history in our shared ministry.

The General Commission on Archives and History develops specific themes for each Heritage Sunday, and many of its resources can help local churches or an Annual Conference commission prepare its own observance. An Order of Worship and A Service of Word and Music are prepared around the theme each year. Several resource booklets are also available. Published under the general title of Celebrating Our Heritage, they include orders of worship, preaching suggestions, dramatic readings, ideas for Sunday school programs, reading lists, and other materials geared to each year’s theme. The General Commission also has published a booklet of more general worship resources as well as a packet of planning suggestions for churches wishing to celebrate their heritage. Local churches and conference commissions are certainly free to develop their own themes and/or to celebrate Heritage Sunday at other more convenient times of the year.

Heritage Sunday is featured each year in an issue of Interpreter (the denomination’s program journal). However, it is the conference commission that has the major responsibility for promoting this special day in local churches.

Besides encouraging local church observance, the commission may also wish to develop programs at the district or conference-wide level. This may be a special worship service, an evening event of music or drama, or a dinner honoring special people in the church community. Sunday school classes, youth and adult fellowship groups, church librarians, choirs - many groups in a church, district, or conference can participate in and appreciate such programs. The commission may want to develop a portable exhibit about the Heritage Sunday theme that can be taken to churches throughout the conference.

Heritage Sunday can serve as a vehicle for launching any number of history-related projects in the Annual Conference: oral history interviews with retired church workers in the conference; a
new conference history; the preservation of an Historic Site or Heritage Landmark; or a children’s poster contest. The underlying message of all Heritage Sunday observances is that history is an essential part of the church’s ministry, and that all members of the church family can celebrate our shared heritage.

Remember that United Methodist heritage is also community heritage. Involve local historical societies, libraries, and genealogical societies in your projects. Consider celebrating the religious heritage of your region by cooperating with churches of other faiths in a special ecumenical program.

If your Annual Conference approves, the conference commission may call for a special offering on this Sunday for improving or building an historical center, maintaining historic sites, writing a conference history, or another worthy project.

The Internet

The Internet is a vast resource and an exciting tool. There is even something on it for archivists, historians, and United Methodists! GCAH maintains its own website: www.gcah.org. Check it out! If you want to stay informed about current events in the denomination, something every historian should do, then you can regularly visit the United Methodist Communications home page on the World Wide Web. It contains information about the denomination and has links to other agencies’ pages. Its address is: http://www.umc.org/

The Internet is populated with a variety of sites, and more are added every day. Many local churches are setting up home pages, for example. Many of these can be located by searching the Internet for the term “United Methodist.” It can be hard to keep up with such a fluid resource, but if you have the capability through the conference office, at your church, or at your home, we urge you to take advantage of this new and very exciting technology.