Center for Applied Research in the Apostolate
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Religious Archives Survey

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Survey Methods

This report provides results for two surveys. Every major superior of women's religious institutes in the United States, 522 in all, was sent a survey regarding their archives. They were also asked to send a second survey to their archivist for more detailed information about their archives. These surveys were in the field from April 6, 2022 to July 7, 2022. Multiple reminders were sent out to encourage participation. A total of 210 superiors responded to the survey (40% response rate). A total of 184 archivists responded.

Leadership Survey

Fourteen percent of respondents indicated that their community is diocesan and 79% said it was pontifical. Seven percent did not respond to the question.

Is your community:		
	Frequency	**Percent**
Diocesan	30	14.3
Pontifical	166	79.0
No response	14	6.7

Fifty-three percent said their community is international.[1]

Is your community international?		
	Frequency	**Percent**
Yes	111	52.9
No	85	40.5
No response	14	6.7

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[1] A follow-up question asked respondents to name the countries where they are present. The responses to this question are provided in Appendix II.

The mean number of members in communities is 112 and the median is 58.[2] Twenty-two percent have 20 or fewer members and 21% have 21 to 50 members. Three in ten have 51 to 100 members and 20% have 100 or more.

Size of your community, i.e., number of members:		
	Frequency	**Percent**
20 or fewer	46	21.9
21 to 50	45	21.4
51 to 100	63	30.0
More than 100	41	19.5
No response	15	7.1

The average age of members is 74.5 and the median age is 80. Forty-five percent of respondents said their average age for members is in the 80s.

What is the average age of your membership?		
	Frequency	**Percent**
Under 70	41	19.5
70 to 79	52	24.8
80 or older	94	44.8
No response	23	11.0

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[2] In some cases, respondents appear to provide the number of local community members and others reported a number reflecting the sisters in their community worldwide.

The most common primary ministries are education (69%), health care (34%), social services (30%), and pastoral or parish work (30%).

What is your community's primary ministries?		
	Frequency	**Percent**
Education	133	69.3
Health Care	66	34.4
Social Services	58	30.2
Pastoral/Parish Work	57	29.7
Contemplative/Prayer	35	18.2
Spiritual Direction	35	18.2
Social Justice	33	17.2
Retreats	14	7.3
Retreats	14	7.3
Volunteering	9	4.7
Senior Living	5	2.6
Nothing specific	5	2.6
Guest House	2	1.0
Campus Ministry	2	1.0
Making a product	1	0.5

Eighty-six percent indicate they have an existing archive. Five percent indicate they need to establish an archive. Fewer than 1 percent said they do not need an archive. Eight percent did not respond to the question.

Which of the following best describe your community's archive? Please select one.		
	Frequency	**Percent**
a. We have an existing archive	181	86.2
b. We need to establish an archive	11	5.2
c. We don't need an archive at this time	1	0.5
No response	17	8.1

Among respondents in communities without archives, the most common reasons cited for not having an archive was the need for guidance on how to begin (66%) and other community work has been a priority (66%). A quarter indicated they are a newer community and another quarter said they did not have the funding needed to establish an archive. Half plan on establishing an archive.

If you currently do not have an archive, which of the following best explain why your community has not established an archive? Choose all that apply. Percent (Frequency) among those who do not have an archive		
	Selected	**Not Selected**
We are a newer community	25.0 (3)	75.0 (9)
We need guidance on how to begin	66.6 (8)	33.4 (4)
We don't have the necessary funding	25.0 (3)	75.0 (9)
Other community work has been a priority at this time	66.6 (8)	33.4 (4)
We plan on establishing an archive	50.0 (6)	50.0 (6)

Among those planning on establishing an archive, 65% have identified space, 25% have identified personnel needs, and 13% have created a budget.

If you are planning on establishing an archive, have you… Percent (Frequency) among those planning an archive		
	Yes	**No**
Identified space	64.7 (11)	35.3 (6)
Created a budget	12.5 (2)	87.5 (14)
Identified personnel needs	25.0 (4)	75.0 (12)

Fifteen percent of respondents indicated that their community is in the process of merging or closing.

Is your community in the process of merging or closing?		
	Frequency	**Percent**
Yes	32	15.2
No	157	74.8
No response	21	10.0

Twenty-four percent indicate that their community has a management plan that anticipates downsizing, merging, or completion in the coming years.

Does your community have a management plan that anticipates downsizing, merging, or completion in the coming years?		
	Frequency	**Percent**
Yes	50	23.8
No	112	53.3
Don't know	12	5.7
Doesn't apply	19	9.0
No response	17	8.1

Thirty-two percent of respondents indicate that they have a long-term plan for the disposition of their archival collections.

Does your community have a long-term plan for the disposition of your archival collections?		
	Frequency	**Percent**
Yes	68	32.4
No	99	47.1
Don't know	9	4.3
Doesn't apply	19	9.0
No response	15	7.1

Respondents who are anticipating transitioning their archive to a repository were asked about the desirability of different options. The most favored was a charism-based archive (42% "very" desirable) followed by regional and collaborative archive for women religious (37% "very" desirable) and an academic archive (32% "very" desirable). The less desirable option is a local archive (3% "very" desirable).

		If you anticipate transitioning your archive to another repository in the future, how desirable are each of the options? Percent (Frequency)		
	Not at all	**A little**	**Somewhat**	**Very**
Academic archive (college or university)	35.1 (47)	14.2 (19)	18.7 (25)	32.1 (43)
Charism-based archive	18.7 (25)	14.9 (20)	24.6 (33)	41.8 (56)
Regional, collaborative archive for women religious	15.7 (21)	11.9 (16)	35.8 (48)	36.6 (49)
Local archive (museum, historical society, nonprofit, in your area)	57.1 (72)	20.6 (26)	19.0 (24)	3.2 (4)
Diocesan archive	51.2 (66)	20.2 (26)	18.6 (24)	10.1 (13)

Forty-one percent did not respond to the question about when they anticipate needing to transition their archive. Presumably, this question did not apply to them and they are not anticipating this. Only 3% of respondents indicate transitioning within this year. Fifteen percent may transition in three to five years, and 21% within five to 10 years. One in five plans for a transition outside of the next ten years.

When do you anticipate needing to relocate or transition your archive? Select one		
	Frequency	**Percent**
Within the year	7	3.3
3-5 years	31	14.8
5-10 years	44	21.0
10+ years	41	19.5
No response	87	41.4

Twenty-nine percent say that finances for the future management of their archive is a concern.

Are finances to support the management of your archives in perpetuity a concern?		
	Frequency	**Percent**
Yes	60	28.6
No	126	60.0
No response	24	11.4

Two-thirds of respondents said their archivist is involved in future planning for their archives.

Is your archivist involved in future planning for the archives?		
	Frequency	**Percent**
Yes	138	65.7
No	48	22.9
No response	24	11.4

Thirty-five percent of respondents said they would be interested in an external consultant to assist in with the future planning for archives (representing 73 institutes).

Would you be interested in an external consultant to assist with future planning for archives?		
	Frequency	**Percent**
Yes	73	34.8
No	112	53.3
No response	25	11.9

Only 5% of respondents said they had included the management and preservation of their archive into your legacy plans through a trust or planned gift.

Have you included the management and preservation of your archive into your legacy plans through a trust or planned gift?		
	Frequency	**Percent**
Yes	10	4.8
No	176	83.8
No response	24	11.4

Archivist Survey

Respondents were asked about the size of their archive collection. A total of 22 respondents provided an answer in square feet. The average response was 554 square feet. Fifty-six respondents provided a response in linear feet. The average response was 1,765 linear feet. Forty-six respondents provided a figure but did not specify if this was in square or linear feet. The average response for these was 1,124.

Size of your archival collection in square and/or linear feet

	Square Feet	Linear Feet	Feet
Mean	554.3	1,764.9	1,123.5
Median	284.0	400.0	710.0
Minimum	3.0	5.0	5.0
Maximum	3,791.0	65,000.0	7,500.0

A total of 130 respondents provided an estimate of the number of boxes in their archive. The average archive contains 609 boxes (median of 278).

Number of standard boxes in archival collection?

	Boxes
Mean	609
Median	278
Minimum	4
Maximum	6,300

A total of 110 respondents provided an estimate for their square footage of archive space. The average space includes 1,025 square feet (median of 600).

Square feet of archive storage space?

	Square Feet
Mean	1,024.6
Median	600.0
Minimum	5.0
Maximum	10,650.0

Respondents were asked about who they report to. Twenty-percent provided the name of a specific individual. Others indicate a specific person in leadership (e.g., Abbess, Prioress, General Superior, Mother General) or a group of leaders (e.g., Leadership Team).

Sixty percent of respondents indicate their institute has an archival staff.

Do you have an archival staff?		
	Frequency	Percent
Yes	111	60.3
No	64	34.8
No response	9	4.9

Fifty-nine respondents (32%) have professionally-trained lay archivists. The average institute with these has one or two of these lay people on staff working an average of 34.8 hours per week, on average. Twelve respondents (7%) have professionally-trained sister archivists. The average institute with these has one these sisters on staff working an average of 30.4 hours per week, on average. Forty-nine respondents (27%) have sister archivists. The average institute with these has two of these sisters on staff working an average of 27.4 hours per week, on average. Fifty-four respondents (30%) have sister volunteers. The average institute with these has two of these sisters on staff working an average of 14.6 hours per week, on average. Twenty-four respondents (13%) have lay volunteers. The average institute with these has two of these lay people on staff working an average of 10.7 hours per week, on average.

Number of Staff and Weekly Hours Number indicating staff with means for those with each staff type			
	Institutes with Staff Type	Number of Staff	Weekly Hours
Professionally-trained (i.e., degreed in library science, history, etc.) lay archivist(s)	59	1.4	34.8
Professionally-trained sister archivist(s)	12	1.3	30.4
Sister archivist(s)	49	1.7	27.4
Sister volunteer(s)	54	2.3	14.6
Lay volunteer(s)	24	2.0	10.7

Sixty-five percent of respondents indicate that their archive has a dedicated budget.

Does your archive have a dedicated budget?		
	Frequency	Percent
Yes	120	65.2
No	47	25.5
No response	17	9.2

Sixty-four percent of respondents say their archive is temperature and humidity-controlled.

Is your archive temperature and humidity-controlled?

	Frequency	Percent
Yes	117	63.6
No	51	27.7
Don't know	1	0.5
Doesn't apply	6	3.3
No response	9	4.9

A third of respondents say their archive has a digitization program.

Does your archive have a digitization program?

	Frequency	Percent
Yes	60	32.6
No	111	60.3
No response	13	7.1

A third of respondents say they have a collection policy, 73% have restricted or confidential files, 54% legal or property files, and 64% access policies.

Do you have the following policies or procedures?
Percent (Frequency)

	Yes	No	No response
Collection Policy	32.6 (60)	60.3 (111)	7.1 (13)
Restricted/Confidential Files	72.8 (134)	16.8 (31)	10.3 (19)
Legal/Property files	53.8 (99)	33.2 (61)	13.0 (24)
Access Policies	63.6 (117)	26.6 (49)	9.8 (18)

Fifty-percent of respondents use finding aids to maintain intellectual control over their collections. Fifty-five percent use inventories or catalogs. Twenty-three percent use collection management systems to maintain intellectual control. One in five said this question did not apply to them.

How do you maintain intellectual control over your collections? Percent (Frequency)		
	Selected	**Not Selected**
Finding Aids	56.0 (103)	44.0 (81)
Inventories or catalogs	54.9 (101)	45.1 (83)
Collection Management System (CMS)	22.8 (42)	77.2 (142)
Not applicable	19.6 (36)	80.4 (148)

On average, 70% of collections are inventoried and catalogued. Fifty-seven percent are fully processed and 74% are properly stored in archival boxes, folders, etc.

Percentage of your collection that is…		
	Inventoried and cataloged	**Fully processed**	**Properly stored in archival boxes, folders, etc.**
Mean	69.8	57.0	74.2
Median	80.0	70.0	85.0

The most commonly used collection management systems used by respondents are Microsoft Word (59%), Microsoft Excel (48%), and Microsoft Access (22%).

What Collection Management System (software) do you use to manage collections? Percent (Frequency)		
	Selected	**No Selected**
Microsoft Word	59.8 (110)	40.2 (74)
Microsoft Excel	47.8 (88)	52.2 (96)
Microsoft Access	22.3 (41)	77.7 (143)
PastPerfect	9.8 (18)	90.2 (166)
ArchivesSpace	3.8 (7)	96.2 (177)
Access to Memory (AtoM)	1.6 (3)	98.4 (181)
Other	19.6 (36)	80.4 (148)
None	16.8 (31)	83.2 (153)

Other systems noted by respondents were ArchivistsToolkit, ARCS, Catalogt, File Maker (DBS, Pro), Google Docs, Google Photos, LibraryThing, Airtable, Lotus approach, Minisis, MUSARCH, Adobe pdf, Proficio, ReedrdExpress, and Word Perfect.

Sixty-two percent of respondents say their archive includes born-digital material.

Does your archive include and collect born-digital material (e-mails, digital documents, digital photographs, websites, etc.)?		
	Frequency	**Percent**
Yes	114	62.0
No	59	32.1
No response	11	6.0

Fifty-seven percent of respondents said that their archive is accessible to the public.

Is the archive accessible to the public (i.e. do you allow external researchers access to collections)?		
	Frequency	**Percent**
Yes	104	56.5
No	68	37.0
No response	12	6.5

A majority of respondents said their archive includes records related to Social Justice (64%). Just under half have records related to underrepresented populations (46%).

Does your collection include records related to the following? Percent (Frequency)		
	Selected	**Not Selected**
Social Justice	64.1 (118)	35.8 (66)
Underrepresented populations	45.7 (84)	54.3 (100)
Indigenous peoples	31.5 (58)	68.5 (126)
Enslaved peoples	6.0 (11)	94.0 (173)
Other special collections	27.2 (50)	72.8 (134)

Seventy-percent of respondents said they were "somewhat" or "very" concerned about long-term preservation and management for their archive. Fifty-four percent of respondents said they were "somewhat" or "very" concerned about personnel for their archive. Forty-two percent respond similarly about space for their archive. Four in ten are "somewhat" or "very" concerned about accessibility and 35% by privacy related to their archive. Budget is a concern ("somewhat" or "very") for 32% of respondents.

					No
How concerned are you about the following issues related to the management of the community archive? Percent (Frequency)					
	Not at all	**A little**	**Somewhat**	**Very**	**response**
Personnel	17.9 (33)	18.5 (34)	26.6 (49)	27.2 (50)	9.8 (18)
Space	27.7 (51)	20.1 (37)	19.6 (36)	22.8 (42)	9.8 (18)
Accessibility	28.8 (53)	20.7 (38)	26.1 (48)	13.6 (25)	10.9 (20)
Privacy	37.5 (69)	15.8 (29)	25.0 (46)	10.3 (19)	11.4 (21)
Budget/Monetary	33.2 (61)	22.3 (41)	20.1 (37)	11.4 (21)	13.0 (24)
Long-term preservation and management	6.0 (11)	12.5 (23)	20.1 (37)	50.0 (92)	11.4 (21)
Other	3.3 (6)	0.5 (1)	3.8 (7)	12.5 (230	79.9 (147)

Fifty-four percent of respondents indicate they engage in archival outreach projects or programs.

Do you engage in archival outreach projects or programs?		
	Frequency	**Percent**
Yes	99	54.4
No	70	38.5
No response	13	7.1

Forty-four percent of respondents have 25 or fewer research requests per year. An additional 17% get 26 to 75 requests. Twelve percent of respondents say they have more than 150 requests per year.

How many research requests/inquiries do you field per year?		
	Frequency	**Percent**
0-25	80	43.5
26-75	32	17.4
76-100	17	9.2
100-150	16	8.7
More than 150	22	12.0
No response	17	9.2

Open-Ended Questions and Focus Groups

Each survey included open-ended questions for which the respondents did not have to choose among a limited set of options but could be free to answer as they saw fit. The Superiors' Survey included three such questions:

- What do you perceive as the value of the congregational archive?
- How does leadership utilize the congregational archive?
- Describe what concerns you have about your archive that were not addressed above.

The Archivist survey included one open-ended question:

- What do you consider the most concern for your archive at present and in the future?

In addition to these open-ended questions, the study also conducted two focus groups: one of ten sisters in congregational leadership, and one of thirteen archivists. Each focus group lasted about an hour and focused on five discussion prompts:

- A brief history of each participant's congregational archival record,
- The benefits of having an archive for the congregation,
- Challenges in creating and maintaining an archive,
- The personnel, plans, and budget needed to create and maintain an archive, and
- The kinds of additional resources that would be needed to better create and maintain an archive.

The following sections will discuss some of the main patterns that occurred in the responses to the open-ended questions, and in the two focus groups.

Leadership Responses: The Value of an Archive and How It Was Used

In answering the first open-ended question, over two-thirds of the congregational leaders (68%) cited "history" or "research" as the major benefit of having a congregational archive.[3] Most of these respondents valued the contribution an archive made in documenting the history of their own congregation, but ten percent said that their archive also contributed to the history of religious life in the United States as a whole. Another fourteen percent noted the benefits of their archive for documenting the history of the U.S. church or a particular diocese. Smaller percentages cited its contribution to the history of the United States overall (5%), to the history of women (2.5%), or to documenting social justice movements (2.5%).

In addition to the value of an archive for historical research, over a quarter of the leadership responses (28%) also mentioned that their archive helped preserve and spread their legacy and charism to future generations. About an eighth (12%) of the respondents simply said that the archive was highly valued – in fact, that it was "priceless."

Samples of these responses include:

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[3] All responses to open-ended questions are presented in Appendix II.

The Archives are of great value. They tell not only the story/legacy of our Congregation, they also tell the story of how the Church, school and regions of our state and country have been impacted by the presence and ministry of women religious. Women religious have shaped our Church and society in many ways – a story that cannot be forgotten. Archives ensure our legacy and energize people for our mission. Archives are essential to understanding our past and moving us into our future

Preserve the rich history of our congregation. Contribute to the story of women's religious congregations in the United States.

Respondents in the Leadership Survey were also asked how leadership utilized the congregational archive. The most common response – 15% of the answers – was that the archives were used to answer requests: from families wanting to know more about a relative, and from former students or patients who wanted to know what had happened to a beloved sister-teacher or sister-nurse. One out of eight (12%) of the answers mentioned that the archives were useful in compiling/creating displays of their history for use in congregational celebrations, chapters, or other events. A few mentioned using these displays as part of fund-raising events, or to create promotional material to send to potential donors. The next-most common answer (8%) was that leadership relied on archival materials to document legal matters or property transfers. An equally common response was that the archival record was used in writing obituaries or eulogies when a sister died. A few respondents said that the archives were useful in initial and ongoing formation of the sisters, and in introducing the new members of their institutions' governing boards to the history of the founding congregation. Only four respondents (2%) admitted to using their archives only seldom or rarely.

Samples of these responses include:

At this time, it is being used to write the history of the community. We get many enquiries about sisters who taught in different areas. We also use it for information when a sister dies. It is also the depository for the records of all the alumnae who graduated from [the congregation's academy].

We are active in the use of archives for programs and resources. Used and tended to when a sister dies. Unfortunately, these records have been invaluable with the statute of limitations in [state] regarding sexual abuse cases where the congregation was also a party named.

We use our archives all the time. Our archivist is wonderful to work with, and she provides excellent presentations and displays at various events and works on many special projects. She assists those doing research on specific topics and assists interns studying in this area. The archives are used to obtain historical and charism information, and also information/documents for legal concerns and issues.

The first question to the focus group of congregational leaders also asked about the value of the archives. The participants mentioned the same benefits which the survey's open-ended questions had surfaced, but the extended format of the focus group allowed them to expand on the benefits in greater detail:

We have . . . a network of schools in the United States. They use our archives to find out information on the past history of their schools, if they don't have all that. We [also] have relatives of our sisters wanting information on them that they may not have. The most recent for us is the cathedral in [city] – our foundress has a corner, a shrine [there]. So we have now put all of our information on our foundress on the website for people to find out more about our community. It's on the website for [diocese] Catholic schools to access information on our foundress.

Another thing is we have most of the schools that the sisters used to teach [in] before, now they're planning on creating something in memory of the sisters. So it's easy for us to go back to the archives and give all the list since the 1920s, the 1800s. It's beneficial. In addition, there have been several times where we have been asked to help research not just the life of a sister, but her contribution to science or some other aspect of the culture in our society. So we have opened our archives to those students, very often the students or family members that are looking for that particular part of their relative's history. The other thing that comes to mind is that there have been a few times where our General Chapter has addressed or proposed addressing current daily issues, specifically and most commonly racism and indigenous populations. So the archives have been so much help in being able to research where we have served in those areas, where we have served those populations and what the sisters have been involved in.

Archivists' Focus Group: The Value of the Archive

The Archivists' Survey did not include an open-ended question about the value of their archives. The Archivists' Focus Group, however, did include this question. This elicited an animated discussion by the participants, covering many of the same points which the Leadership Focus Group had mentioned:

They help make sure that distortions can be corrected and that we're not, our story, our legacy is not lost. Or the contemporary word is "canceled." That can happen. Already it has happened and is happening. So where can we go, where can future scholars and researchers and people go to find out what really was happening in religious life in the 19th and 20th and now 21st centuries?

Both of those, and add to it that one benefit I see at this time, particularly as we are completing our mission, is there are big gaps in what is preserved. This is going to be the last chance for people who have remembered some of the things, particularly the '50s and '60s. So if we can fill in some gaps, at least there will be some record for future generations.

I don't want to dominate [the discussion], but I think it's American history, and it's Church history, and women's history. Women's history has been kind of invisible and suppressed. This is an extraordinary contribution to women's history in this country.

Not just American history, the American Catholic history also, and each religious order's contribution. Because if we don't save this, nobody else is gonna save it for us. The [name of congregation] is a fascinating group. They're very small in comparison. They came in through Canada and were invited by local bishops in Rhode Island and Massachusetts to teach in the parochial schools that dealt with the French Canadian

immigrants who ran the mills. So there's this incredible cultural background that we can share with the rest of the world through them. …

[Also] some sisters had come up from Mexico when there was a revolution in Mexico and they wound up in El Paso. So there's a whole other cultural element that really no one knew about to a great extent. … There are two really interesting cultural bits of that, that talk about the growth of immigrants in the United States and the Church. So I think we really can help scholars with that.

I would say, for me right now, it's a benefit to the family members of our sisters and our deceased sisters. I have gotten requests from all over the Unite States and two from England looking for history about their families. I have been able to provide that for them. Just a quick note, today I was looking through an old newspaper of ours. I found something about a sister I couldn't find anything about. I was able then to find more about this sister, and I contacted the family member to let them know: "Guess what I found today." So it's just really helpful for families.

Both the archivists and the leadership of the religious congregations, therefore, were in basic agreement about the value of the archives. On challenges and concerns about the archives, while there was much agreement, there were also some differences. It is to these that we now turn.

Leadership and Archivists: Challenges and Concerns

The surveys of both groups contained an open-ended question that asked what concerns the respondents had about their congregation's archives. A quarter of the superiors mentioned concerns about the future of the archives: whether about where to send them when the congregation itself could no longer care for them, how to know what to keep and what to discard in the process, or how to deal with logistical issues – especially if the archives were to be moved to another country. One in seven of the respondents to the superiors' open-ended question worried about adequate staffing, both the simple need for more workers in their archives and that they be adequately trained. Another thirteen percent lamented that their archives were in disarray, or that they needed help in figuring how to digitize and catalog them. One in nine cited a need for more time, space, and resources to improve or simply maintain their archives. Smaller numbers mentioned needing help in planning what to do with their archives, or how to protect their integrity and confidentiality. The following are examples of these responses:

We want to choose the repository that will best honor our story. Are there any criteria that could help in this decision? We are considering two sites; which is better for us? That's a concern for sure.

Qualified personnel to maintain archives when our current archivist retires is the main concern. Understanding the job functions so that we have the correct skilled individual(s) in the position.

Need for more space, need commitment to inventory and catalog need policies for collecting, accessing legal/property files. Desire a place for displaying items (i.e. a "Heritage Room").

However, one in five (20%) of the superiors either said they had no concerns or didn't know of any. This might be because the open-ended question in the Superiors' Survey included the phrase "that were not addressed above." Even though none of the survey's previous questions had specifically addressed concerns, the questions had asked about plans for moving the archives and whether the community was in the process of merging or coming to completion. These may have been interpreted as raising concerns, so that the respondents did not think to mention them again.

In contrast, there was a question about concerns in the earlier part of the archivists' survey, and 70% percent of the respondents said they were either "somewhat" or "very" concerned about the long-term preservation and management of the community archive. Over half of the respondents were similarly concerned about personnel, and two-fifths about having enough space and accessibility.

The archivists' responses to the open-ended question echoed the concerns raised earlier in their survey. More than three in ten (32%) worried about whether the archives would continue to be preserved as their congregation came to completion, and about the possible loss to historians if they were sent to a repository – especially if that repository was in another country. More than one in four responses (27%) mentioned the difficulty of organizing often chaotic materials, digitizing records, and devising finding aids that would make them accessible. One in ten mentioned personnel/staffing concerns and one in twenty mentioned not having enough time or space. Unlike the superiors, none of the archivists mentioned having no concerns. Examples of their responses include:

> *My biggest concern is what will happen to the Archives when the Order comes to completion. Will an endowment be left? Will the other programs on campus that bring us visitors still be active? Who will own this property? Who will care for the buildings? My other concern is the rate at which materials are entering the archives as the Order as a whole ages. If we do transfer our archives, we will need more staff to complete processing before the transfer can be completed.*

> *At present, I'm concerned with insuring that materials of archival value are accessioned. The archives/office is still very disorganized, and I often find archival materials in random file cabinets throughout our administrative office. I also want to ensure that records being produced now are properly accessioned. Once there is more order, I want to focus on accessibility. In the future I will be concerned with finding a home for the archives when the congregation reaches completion.*

> *I have one volunteer (sister), so I need more help in the archives. More space is very much needed as I am running out of space to house all of our material. The space provided when we build our monastery is not adequate. In fact, the space that was originally planned was cut back because of cost.*

> *I have intellectual control of all our documents and artifacts. There is no one in the community right now who will be able to take this over – maybe our newest member – and I need to hire an archivist who will work in our archives and get to know them and their value and be capable of digitizing already processed documents.*

The Focus Groups' Concerns

The focus groups of the archivists and the congregational leaders also included extensive comments on the participants' concerns or challenges. While both groups agreed on the main concerns, they differed in how they described them. The participants agreed that sending their congregation's archives to a repository elsewhere was a challenge, and that deciding what to send and what to discard or donate elsewhere was difficult. The congregational leaders also mentioned a concern about how to handle confidential or restricted materials, and those who were in international orders also wondered how and where the archives would be consolidated. The archivists, in contrast, wondered if even the repository to which their congregation was sending the archives would be able to safeguard them. Examples in the discussions around these concerns include:

> *Our greatest challenge is to ty to determine how as a congregation we're going to maintain our archives. Does some of it go to a central location or not? We have two types of archives.   We have our own local community archive and we have the congregation archive. The congregational ones are kept in London, as are the U.K. archives. But how do we pull it all together? Our youngest community is in the Congo. They're only 30 years old. Our archives have been very beneficial to give them some history of who the whole congregation is, and how we came about. The reality is down the road, however may years that's going to be, they'll be the only ones left because we are getting smaller and smaller. But how sensible is it to send all the archives to them? (Superiors' Focus Group)*

> *We also had to write a policy for [the congregation's school] about "What you can see and what you can't, what's restricted, et cetera. … taking what we call our restricted materials, our sensitive materials, our council minutes, or whatever has been declared is restricted. To get that over here, but leave at the school what they can use, what they can have access to. (Superiors' Focus Group)*

> *One thing we found is a lot of things that we have in, like, our Heritage Room are items that we have received over the years, have been gifted or connected somehow with the ministries. It's trying to determine at this point in time what's really fitting to the history and the legacy, and the heritage of the congregation versus all the extraneous gifting an item that doesn't have the same significance. Then how do you decide what do you keep, what do you let go of, and then what do you do with it. (Superiors' Focus Group)*

Both the congregational leaders and the archivists worried about whether the repositories that had been chosen for their archives would be up to the task or would even continue to exist. The archivists mentioned this concern more often than the leaders did:

> *In the 1980s we entered into an arrangement with the University of [X] and transferred our entire archives to [them]. That also gave them the potential for research for students, doctoral students, et cetera. We've been pleased, very pleased with that arrangement. However now, we're getting to a point that new questions come up: how much can they continue to receive? We have the situation still of objects, because they don't want to take objects. … It's not over, because we keep gathering more and more materials. (Superiors' Focus Group)*

[University X] is stopping to take the archives that they have agreed to, because they are in a storage unit someplace out by the airport. … You can't take everybody's. [University Y] is going to find that, too. You can't take everybody's. If every congregation went to one place in the United States, we would have to have space the size of the Pentagon. (Superiors' Focus Group)

We're not always going to have enough sisters where it's feasible to maintain a building where we can have our own archives. So do we turn them over to a repository, do we try and partner with the university? Do we know if the university is going to last? It's a lot of questions about what do you do when you know that you don't have a place that's going to be stable forever, and how you maintain that history and keep it going? (Archivists' Focus Group)

When we move into whatever situation the archives goes, to this collaborative, charism-based archive or whatever happens, I think not everything will be able to go. … I think we'll have to make some, everybody's gonna get, not bring everything. Especially the three-dimensional items. Whether they're textiles, or artwork, or like household utensils, goods and things. (Archivists' Focus Group)

A prominent concern among the archivists, that was not mentioned at all by the leaders, was being overwhelmed, overworked and exhausted. And while the leaders did acknowledge that they needed to have a full-time, trained professional archivist for their congregation, the archivists were more attuned to the potential problem of having a lay professional who was not familiar with their history or charism in charge of their archives:

For me right now my biggest challenge is, I don't have enough of me. It's just me, myself, and I. By attending the ACWR mentorship program, I'm learning so much of things that need to be done, that somehow, I just need to multiply me. … It's just, it's hard to find somebody to come in and help with some of the little things. That would be nice and be off my plate. When I took over two years ago, I mean, I discovered files in the middle cabinets. [They were] not in the finding aids. I mean, I've gotten a lot done, but there's still so much more. (Archivists' Focus Group)

Yeah, also there's way too much for me to do on my own. I do have two volunteers – they are Oblates who come once a week three hours each and they're a huge help, but I could use so much more. … I talked to a lot of archivists and got ideas on what to do, but I think part of the aides, sisters are older. I'm old. I'm almost a Senior Citizen myself. Just to have so much to do, and they're a little bit overwhelmed sometimes, I think. (Archivists' Focus Group)

I agree with what everybody said. I feel overwhelmed myself. I'm at what I guess you would consider full-time. I'm here four days a week. It will be better once I hire an assistant who is a trained archivist. But I find it's hard to balance processing [requests]. I mentioned we have a lot of that. I have not even gotten to finding an aide because we're still processing requests. I've been getting so many because we have schools that have closed and I'll give you an example: our [X] academy was 110 years old and started out as a boarding school and then became a high school. … So I got a request last week from a woman whose grandmother, she thinks, attended the boarding school around

1900. … We have ledgers, and we have student record cards and all. But I had so many other things to do right now, I told her I have to wait for a while until I answer some other requests. Our leadership wants something and I try to give, satisfy their request right away, what they're dealing with, too. So then I get frustrated because I have all this work I plan to do for the day and sometimes half of it doesn't even get finished, or less than that, because then I stop to do requests. (Archivists' Focus Group)

Several other archivists in the Focus Group mentioned this same frustration. Often requests for information from family members, former students, journalists, and even historians go unmet because they are simply overwhelmed by the amount of work they have to do.

The sisters in the Superiors' Focus Group also acknowledged the need for more staff to handle the huge task of organizing their archives in the face of mergers or transferring materials to a repository. They tended to assume that the need could be met by hiring a professional archivist who could make the decisions on how to organize the material, what to keep, etc. Others, however, saw some pitfalls in hiring a professional archivist:

We also have two people working full time in our archives. They both feel that we need to have somebody professionally, a professional trained archivist that we don't have. Especially when Sister [X] will be retiring, it would be a good time for us to hire someone who is trained. (Superiors' Focus Group)

We hired a professional archivist whose mandate was to prepare the archives for donation, to research potential donation sites, and to negotiate with those sites, to educate our members about this, about what we are doing. All that is underway. (Superiors' Focus Group)

All of the sisters who worked in the archives never really had training. Some of them were very good. Others, they did what they could. So we still have one sister who's still there and she knows a lot of stories. She pretty much is able to dig up things when people call and they want to locate someone or for looking for particular photographs of something. But we found out that one of our teachers at our high school is an archival assessor. So she usually comes one night a week after school and usually all summer. … She has diligently gone through things. She enjoys reading it. But she's very young, so she doesn't know a lot. She'll come and ask questions: "What does the renewal mean?" (Superiors' Focus Group)

The best possible thing is to have a [professional lay archivist and an older sister archivist]. She knows the archives and you know the culture. That would be my dream. Everybody should have an old nun and a young archivist. We know the culture. I'm old. We know the culture. It's like a new country. The smartest person in the world doesn't know what a refractory is, but by God they know how to do a finding aid, right? They don't know what JMJ means at the corner of your paper, but they know how to set priorities. So that's the best combination. (Archivists' Focus Group)

Both focus groups spoke about digitization, agreeing that it was necessary, but not always possible for time, skill, and financial reasons. The archivists also pointed out that the sisters were unused to the importance of their electronic communications and did not always think to save them:

Digitization is great, but most archivists will tell you that if it's really important you need to keep the paper. Digitalization is moving so fast … it's very difficult to keep ahead of it. (Superiors' Focus Group)

Our number one challenge right now is digitizing everything, which is highly time consuming. (Superiors' Focus Group)

Also, no one is a digital native. So the way records are being kept on computers – or are they even kept? – someone told me the newsletter she sent out to the group she runs, she just deletes. She uses the template but she deletes the old one. So I was sort of asking the people who receive that [newsletter], "Does anyone have copies of these?" The people don't, and me, too, myself, the way I keep records on a computer is so different than when I was teaching and had all my files in order. It is a lot harder for people even to know what they have. They might know it is valuable, but where is it? (Archivists' Focus Group)

Both groups spoke about the need for education so that the members of the congregation would understand the importance of the archives and the kind(s) of materials that should be there. But the archivists also spoke about the importance of educating the *leadership*. This was, they said, especially true for those congregations which were so close to completion that they no longer had members young enough to serve in leadership, but instead had to have a "commissary," a sister or other person outside of the congregation to run its affairs and care for its members.

I think the education piece for us isn't so much about the archives are essential, but to help them understand how the archives will go forth and how our story of who we are in the larger story of houses in the United States, why that's important. (Superiors' Focus Group)

The other thing we've done [is] the education piece by being conscious of sisters who may have contributions to the archive. Sisters who have worked with indigenous groups, or particular cultures, that may have items that were given to them during their ministry and saying to them, "Don't just leave those, [or] give them to Goodwill. Those are part of the congregation's history." It seems like when sisters begin to realize that the congregation's history is their history, and that they've been able to contribute something toward the archive, then they take a more personal interest. (Superiors' Focus Group)

We still have sisters who are contributing to the records that are still around, which is not often the case in other archives. So it's obviously, it can be a very good thing, but it also presents a challenge. They don't know what we want. We can try to explain, but they often still don't realize what should or shouldn't be there. So kind of making sure that they understand what the purpose of the archives is and getting them, especially like me as a lay archivist, kind of an outsider coming in, getting them to kind of trust me with their stuff in my hands. (Archivists' Focus Group)

There's so many challenges. One of them is that in the general population, archivists are not well-known. In religious congregations, leadership changes every five, six years. The new people coming up, don't know much about archives either. So I think a big

challenge is how to keep the archives and its needs kind of in front of the line, especially as we're reaching completion. That's a battle because there are so many other things that are pressing leadership right now that are urgent. So it's hard for people in leadership, and they have the budget, it's hard for them to step back and think, "Yeah, what am I going to do, where are people going to go in 50 or 100 years?" … We need leaders to understand who [we are], what we need, and anything you can do to help us. (Archivists' Focus Group)

I would be willing to bet that not a lot of leadership, not only doesn't have time for it, but they really don't even know what we do. (Archivists' Focus Group)
A big challenge [is] we have a commissary and she's beginning her second term. She is from another community, one that we are in covenant with. They don't know our history. So we become the experts, but also happy to be proactive in reminding them of different things. I think that's a challenge but it's also a blessing for us as archivists to keep that in mind, that we do get a commissary or whatever she will be called, you have to be the experts in helping to educate them for the community history. (Archivists' Focus Group)

Conclusion and Recommendations

The archivists' focus group had many recommendations for what needed to be done to address their concerns. Several named a specific consultant who, they said, had helped them…

to prioritize things and give sort of a list of suggestions on what to work on and how we can better organize things. Not to mention she has been in so many different archives. The general ideas like, what do other people keep? So, we had a lot of duplications or things that … were well preserved, but they weren't really our history. So she will kind of be, like, "Well you might be wasting your time trying to get these to other organizations when I've already been there and I know they have this [already]." So having her is very valuable because she could just kind of help me see the forest instead of just the trees.

Other participants agreed that it would also be very helpful to have examples of what other congregations have done. As one archivist said,

It would also be so helpful to have examples of what other religious have done in their archives, especially with categories. For example, we have letters in our archives. So there are letters to the congregation. It's kind of clear that those would stay together. But then, OK, let's say the Prioress General might [write a letter to] the bishop in a diocese where we're about to start a school. Does that letter go with the prioress general [letters], or does that go with the information about that mission? There are just tons of questions like that that we come across when we're trying to organize things.

Several participants stated that more leadership and direction from LCWR and their own leadership was needed.

I think what we need is clarity and direction from our leadership and from LCWR. Given the situation, figure out what to do with the [archive] room of the property [which is being sold], we don't, we simply don't know.

I think it would be wonderful if LCWR is going to get involved. There could be a webinar for leadership on just the basics. Because, having been in leadership for 26 years, I am willing to say that it's never become a top priority for us.

But what I really want to say is I think leadership needs to really be involved. I know we said this before, but I had a very difficult time a couple of years ago. My assistant, I had my assistant for one day [per week, and I asked] to hire her for an extra day. I had to write this long, formal application and convince them, the leadership. It was a different team. But also we had lay people who work for us just as everybody does. They don't understand. Our financial director is a man and they don't get it. I think leadership is really key. For them … to understand your needs and not just to see it as something financial.

The participants, however, uniformly praised ACWR for its efforts in mentoring and advising them. There were several ACWR mentors in the focus group, and they expressed their willingness to help even more:

Can I just jump in about ACWR? Thank you, sister. Those of us who are mentors, if you need help you may not have the funds to hire a consultant. Call, or get in touch with us. We can do things on Zoom, we can do things over the phone. I helped a lot of communities just because I went to Catholic school and I know what side my bread is buttered on. I'll do anything a sister asks me. So get in touch with mentors if you need anything.

Again, I'm with [previous participant] and others who said the ACWR, they're just a bunch of nice people. … We are just helping people. Just, please, ask us. They're really very good people with a lot of experience. They will help you. … I mean I had those kinds of questions when I started out. I had a couple of people I could just shoot an email up real quick and get a quick reply. That's what a mentor does, they just help you.

Appendix I: Questionnaires

April 6, 2022

Dear Major Superior and Archivist,

We want to thank you in advance for your attention to this important invitation to participate in our survey on the state of Archives of women religious in the United States, which has been generously supported by a grant from the Conrad N. Hilton Foundation.

Whether a congregation is in the beginning of its journey, in mid-life or coming to fulfillment, its Archives is the heart and soul of the congregation's memory. A congregation's Archives is an invaluable resource, a treasury of stories documenting every facet of outreach and service that shaped the communities and dioceses in which the congregation lived and served. We are at a time and place in history when it is time to raise up these rich archival collections, take an accounting, and shape a vision for their future. What will be a final plan for an Archives? Or, equally important, how might a congregation begin an Archives?

A collaboration of conversation partners – including directors of four heritage centers and leaders of the Council of Major Superiors of Women Religious (CMSWR), Leadership Conference of Women Religious (LCWR), Archivists for Congregations of Women Religious (ACWR) and Archival Resources for Catholic Collections (ARCC) -- was formed to address these and other related questions and issues.

The collaboration worked with the Center for Applied Research in the Apostolate (CARA) to field two surveys, one specific to congregational leaders and one to congregational archivists. The results of the surveys will provide a national snapshot of current archival practices; help congregations ultimately plan for their Archives; inform the types of resources and programs needed to support and guide congregations; and inform the options needed to preserve these invaluable collections.

As national planning is underway, the data from this survey will provide critical information to support and assist congregations now and in the future. We are aware of the demands on your time and your need to balance many priorities, however, we ask you to please make the time to complete this important survey so that we can have the most accurate data.

Please complete the survey no later than April 27 and return it to CARA, 2300 Wisconsin Ave., NW, Suite 400A, Washington, DC 20007. Results will be shared with participants and made available to the public when completed.

Sincerely,

Archivists for Congregations of Women Religious
Archival Resources for Catholic Collections
Boston College
Council of Major Superiors of Women Religious
Heritage and Research Center at Saint Mary's College
Leadership Conference of Women Religious
Santa Clara University
Sisters of Charity Foundation of Cleveland
Women Religious Archives Collaborative, Cleveland, OH

Leadership Questionnaire

This survey inquires about your religious community. This is the congregation, province, region or other level of governance for which you are responsible for. The first section is to be filled about by the community Leader and the second by the community Archivist before being returned to the Center for Applied Research in the Apostolate (CARA). If you have any questions about the survey please contact CARA Research Associate Mark Gray at mmg34@georgetown.edu or at 202-687-0885.

Community name:	
Contact person:	
Email:	
Telephone:	

_____ 1. Size of your community, i.e. number of members

2. Is the community…
☐ Diocesan or ☐ Pontifical

Yes No
☐   ☐ 3. Is your community international?
3a. If yes, what countries have ministries and/or sisters:
_____
_____
_____
_____
_____
_____

_____ 4. What is the average age of your membership?

5. What is your community's primary ministries?

6. Which of the following best describe your community's archive? Select one:
☐ a. We have an existing archive
☐ b. We need to establish an archive
☐ c. We don't need an archive at this time

If you currently do not have an archive, which of the following best explain why your community has not established an archive? Choose all that apply:
☐ 7a. We are a newer community
☐ 7b. We need guidance on how to begin
☐ 7c. We don't have the necessary funding
☐ 7d. Other community work has been a priority at this time
☐ 7e. We plan on establishing an archive

If you are planning on establishing an archive, have you…
Yes No
☐   ☐ 8a. Identified space?
☐   ☐ 8b. Created a budget?
☐   ☐ 8c. Identified personnel needs?

Yes No
☐   ☐ 9a. Is your community in the process of merging or closing?

10. Does your community have a management plan that anticipates downsizing, merging, or completion in the coming years?
☐ a. Yes
☐ b. No
☐ c. Don't know
☐ d. Doesn't apply
11. Does your community have a long-term plan for the disposition of your archival collections?

☐ a. Yes (describe below; 11a)

☐ b. No

☐ c. Don't know

☐ d. Doesn't apply

11a. <u>If yes</u>, please briefly describe your plan:

For questions 12a to 12e respond: 1=not at all, 2=s a little, 3=somewhat, and 4=very
<u>If you anticipate transitioning your archive to another repository in the future</u>, how desirable are ach of the options?

1 2 3 4

☐ ☐ ☐ ☐ 12a. Academic archive (college or university)

☐ ☐ ☐ ☐ 12b. Charism-based archive

☐ ☐ ☐ ☐ 12c. Regional, collaborative archive for women religious

☐ ☐ ☐ ☐ 12d. Local archive (museum, historical society, nonprofit, in your area)

☐ ☐ ☐ ☐ 12e. Diocesan archive

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13. <u>If your community has already experienced a transition</u>, where did the archive go?

---

14. When do you anticipate needing to relocate or transition your archive? Select one:

☐ a. Within the year

☐ b. 3-5 years

☐ c. 5-10 years

☐ d. 10+ years

☐ e. Not applicable

Yes No

☐   ☐ 15. Are finances to support the management of your archives in perpetuity a concern?

Yes No

☐   ☐ 16. Is your archivist involved in future planning for the archives?

☐   ☐ 17. Would you be interested in an external consultant to assist with future planning for archives?

---

18. What do you perceive as the value of the congregational archive?

---

19. How does leadership utilize the congregational archive?

Yes No

☐   ☐ 20. Have you included the management and preservation of your archive into your legacy plans through a trust or planned gift?

---

21. Describe what concerns you have about your archive not addressed above:

Archivist Questionnaire

Archivist Name:	
Email:	

1. Size of your archival collection in square and/or linear feet:
   _____ sq. ft. and/or _____ ln. ft.
   ☐ Don't know

_____ 2. Number of standard boxes in archival collection?

_____ 3. Square feet of archive storage space?

4. Who do you report to?
_____
_____

Yes No

☐ ☐ 5. Do you have an archival staff?
   If yes, please identify these details:
_____5a. Number of professionally-trained (i.e., degreed in library science, history, etc.) lay archivist(s); weekly hours: _____

_____5b. Number of professionally-trained sister archivist(s); weekly hours: _____

_____5c. Number of sister archivist(s); weekly hours: _____

_____5d. Number of sister volunteer(s); weekly hours: _____

_____5e. Number of lay volunteer(s); weekly hours: _____

☐ ☐ 6. Does your archive have a dedicated budget?

7. Is your archive temperature and humidity-controlled?
☐ a. Yes
☐ b. No
☐ c. Don't know
☐ d. Doesn't apply

8. In broad categories, please describe the materials housed in your archive. For example, paper records, audio-visual material, artifacts, artwork, architectural records, etc.

Yes No

☐ ☐ 9. Does your archive have a digitization program?

Do you have the following policies or procedures?
Yes No
☐ ☐ 10a. Collection Policy
☐ ☐ 10b. Restricted/Confidential Files
☐ ☐ 10c. Legal/Property files
☐ ☐ 10d. Access Policies

Yes No
☐ ☐ 11. Has leadership approved of any of the above checked policies?

12. How do you maintain intellectual control over your collections?
☐ a. Finding Aids
☐ b. Inventories or catalogs
☐ c. Collection Management System (CMS)
☐ d. Not applicable

_____ 13. Percentage of your collection that is inventoried or cataloged (estimate)?

_____ 14. Percentage of your collection that is fully processed (estimate)?

_____ 15. Percentage of the collection that is properly stored in archival boxes, folders, etc.

What Collection Management System (software) do you use to manage collections? Check all that apply:

☐ 16a. Microsoft Word

☐ 16b. Microsoft Excel

☐ 16c. Microsoft Access

☐ 16d. PastPerfect

☐ 16e. ArchivesSpace

☐ 16f. Access to Memory (AtoM)

☐ 16g. Other; Please name _____

☐ 16h. None

17. Does your archive include and collect born-digital material (e-mails, digital documents, digital photographs, websites, etc.)?

☐ a. Yes, how do you manage these records?
_____
_____
_____

☐ b. No

Yes No

☐   ☐ 18. Is the archive accessible to the public (i.e. do you allow external researchers access to collections)?

Does your collection include records related to the following? Check all that apply:
Yes No

☐   ☐ 19a. Social Justice

☐   ☐ 19b. Underrepresented populations

☐   ☐ 19c. Indigenous peoples

☐   ☐ 19d. Enslaved peoples

☐   ☐ 19e. Other special collections:

_____

For questions 12a to 12e respond: 1=not at all, 2=s a little, 3=somewhat, and 4=very
How concerned are you about the following issues related to the management of the community archive?
1 2 3 4

☐ ☐ ☐ ☐ 20a. Personnel

☐ ☐ ☐ ☐ 20b. Space

☐ ☐ ☐ ☐ 20c. Accessibility

☐ ☐ ☐ ☐ 20d. Privacy

☐ ☐ ☐ ☐ 20e. Budget/Monetary

☐ ☐ ☐ ☐ 20f. Long-term preservation and management

☐ ☐ ☐ ☐ 20g. Other, specify:

_____

Yes No

☐   ☐ 21. Do you engage in archival outreach projects or programs? If yes, please describe:
_____
_____
_____

22. How many research requests/inquiries do you field per year?

☐ a. 0-25

☐ b. 26-75

☐ c. 76-100

☐ d. 100-150

☐ e. 150+

23. What do you consider the most concern for your archive at present and in the future?