

ST. PETER'S CATHEDRAL ARCHIVES

STRATEGIC PLAN

PREPARED BY THE
ST PETER'S CATHEDRAL
ARCHIVES COMMITTEE

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TABLE OF CONTENTS

Introduction.....	3
Cathedral Background	3
Archives Overview	4
Environmental Conditions	5
Archives Policies and Procedures.....	5
Nature of Archival Holdings.....	6
Status of Cathedral Records.....	7
Analysis.....	8
Strategic Plan	11
Vision, Mission, Mandate	11
Goals 2017-2019	12
Risks and Contingencies	30

INTRODUCTION

St Peter's Cathedral in Charlottetown, Prince Edward Island received funding from the Documentary Heritage Communities Program of Heritage Canada in 2016 to conduct a strategic plan for its archival operations, covering a 3- to 5-year time horizon.

As requested by the Cathedral, the final strategic plan includes: a clarification of mission, goals, and strategies; resource requirements (including funding, human resources, and facilities); actual and optimal governance structures; priority actions in all major areas of archival management (such as acquisitions, conservation, arrangement, description, and outreach); identification of measurable products and targets; and suggested deadlines. In addition, a SWOT analysis of St. Peter's Cathedral Archives has been conducted. Background information about the Archives is included to provide context.

Laura Millar, an archival consultant from Roberts Creek, British Columbia, was engaged to work with the Archives Committee and other members of the Cathedral to develop this strategic plan. Laura visited the Cathedral from December 12-16, 2016 and continued to work with the Cathedral representatives through to the end of January 2017.

A summary of the meetings held during the consultant's site visit in December 2016 is included as Document A in the SPCA Strategic Planning Project Report.

CATHEDRAL BACKGROUND

St. Peter's Cathedral has played a significant role in the religious life of Prince Edward Island since it was built as a chapel of ease in 1869 to serve more conveniently the needs of poor people living in the western section of Charlottetown, commonly referred to as the "bog." Parishioners are proud of this humble beginning and the church's unwavering adherence to the Anglo Catholic tradition, which finds its roots in the Oxford or Tractarian movement in England in the 1830's.

St. Peter's Cathedral is also home of All Souls' Chapel. The Chapel was built in 1888 and is a beautiful example of High Victorian Gothic architecture in Island sandstone. All Souls' Chapel, directly adjacent to St. Peter's Anglican Cathedral, was recognized as one of Canada's Historic Places in 1990. The chapel was designed by the architect, William Critchlow Harris, ARCA (1854-1913). The Canada's Historic Places program is administered by Parks Canada, in collaboration with the provinces and territories.

The reason for the national designations of All Souls' Chapel is concerned with the architectural construction features of the building. There are also numerous significant decorative features blanketing the interior of the chapel.

Among the notable interior decorative features are fifteen paintings on canvas (murals) and three reverse paintings on glass that were painted by Robert Harris CMG, PRCA (1849 – 1919),

the brother of William Critchlow Harris. The PEI Confederation Art Gallery archives the architectural plans for the building and significant material on the architect and artist.

St Peter's Cathedral was also home to two Fathers of Confederation, now buried in the Cathedral Cemetery.

Administratively, the Cathedral falls within the Diocese of Nova Scotia and Prince Edward Island, which is based in Halifax, Nova Scotia.

A history of the Cathedral, written by H.M. Peter Westin and published in 1994, outlines the first fifty years of the Cathedral's history. See *An Act of Faith: The First Fifty Years of St. Peter's Cathedral*, published by St. Peter Publications. A second volume is in manuscript form awaiting completion.

ARCHIVES OVERVIEW

The Archives Committee for St. Peter's Cathedral Archives (SPCA) was formed not long after the opening of the new Cathedral Hall and the provision of dedicated space for archival storage. (Michael Smitherman, now the Volunteer Committee chair, drew up the floor plan for the Archives room on May 31, 2006 and the room was built largely to those specifications.)

The main focus of the volunteer group has been on sorting and gaining some physical control over archival materials that had been scattered around the buildings, most of which was brought from the tower of the Cathedral and moved to the basement for sorting and review after the basement room was opened, as outlined in more detail below.

Currently, the Archives Committee usually meets once a week on Monday afternoons for two hours, to process archival materials. They do not meet in July or August nor do they meet during Advent.

The Committee works primarily on accessioning materials so that they can be given an accession number and stored in acid-free containers, and on cataloguing photographs, filling out catalogue worksheets which are stored in binders in an acid-free container, waiting for the preparation of indexes.

The Archives Committee has no direct budget and obtains resources by requesting funds or donations as needed. The general agreement is to limit expenditures to about \$2000 a year at most. Supplies are purchased from Carr Maclean or Staples, and items such as the computer, filing cabinets, and storage cupboards were gifts. The upholstered chairs were paid for by committee members.

The loss of federal NADP funding affected the ability of the Prince Edward Island Archives Council to provide conservation advisory services, which affected the ability of SPCA to access regular conservation support. They are still able to get a small amount of conservation help from time to time from the Public Archives and Records Office of Prince Edward Island (PARO), through the Provincial Archivist Jill MacMicken-Wilson.

Over time, special projects have been a priority. For example, in 2012 and 2013 the focus of the Archives Committee's efforts were on reviewing the Cathedral's book collection. Over 1000 books from several sources, including from the estates of E.J. Hodgson (brother of Rev. G.W. Hodgson), Fr. Jacque Smith (assistant priest), and Mrs. Westin (widow of Canon Westin) were reviewed and many distributed to other locations or sold in fund-raising events.

The Committee has received a small number of enquiries from users, but the Committee members suggest they are not authorities on the content of the archives; their priority is to sort the materials and try to achieve some order. They noted that photographs have the highest public interest.

Starting in 2009, the Archives Committee published information in monthly Cathedral bulletins about the "Archives Corner," highlighting items in the collection. An "Open House" was held in 2008 and again in 2010 to share information with the Cathedral community and public. These promotional activities have not happened in recent years.

The 2010 annual report for the Archives Committee noted that the group held 23 committee meetings and 48 work sessions, and that "business at our meetings has centred mainly around accessioning, sorting and reviewing the collection and trying to devise a succession strategy for the committee."

Environmental Conditions

The room for the archives is an excellent size and seems to be cool and not damp. There is a run of four pipes going through the ceiling of the archives room, which are part of a water-based sprinkler system.

There appears to be no other in-room heat source aside from the space heaters. There is a six-inch space between the backs of the partitions and the concrete basement walls. The vents are to assist in the circulation of air through this space and so minimize the risk of moisture transfer. There are also hatches that allow for inspection of drain pipes from the kitchen and washrooms above.

There is a thermometer/humidity gauge on the main table in the Archives room. An effort is made to maintain 54-60% humidity readings. In about 2012 a recorder was installed for a year to monitor moisture levels. The levels in the Archives room proved to be quite stable and within the recommended range. The dehumidifier is operated year-round and monitored by the Sextons. Space heaters are turned on about thirty minutes before meetings or work activities and unplugged when people leave the room.

All archival materials in the Archives room are off the floor and on shelving, in filing cabinets, or on tables.

Archives Policies and Procedures

A St. Peter's Cathedral Archives Policy Statement was formulated and approved in March 2010 and reviewed formally in December 2015. The policy defines the purpose and scope of SPCA

and confirms issues of ownership, access, and storage. The policy also guarantees that archival materials will be cared for in accordance with archival principles and best practice whenever possible.

Access to the Archives Room is controlled: anyone coming into or leaving the Archives Room is required to sign a register, and the room is kept locked when not in use.

The Archives Committee has developed an “accession record” form and an “image data record” form to capture information about archival materials. The accessioning and cataloguing processes are manual, with accession and image data forms completed by hand and archival materials placed into boxes by accession number. Nothing has been entered into a computer database or otherwise captured in electronic form.

Michael Smitherman visited the Diocesan Archives in Halifax in May 2008 and Lorraine Slopek of the Diocesan Archives visited St. Peter’s in the same month; she returned in October 2008 to run a workshop on “creating a church archives.”

A computer was given to the Archives in 2010. Jill MacMicken-Wilson from the Public Archives and Records Office of Prince Edward Island devised a database model for the Archives Committee. However, no data have been entered into this database.

In 2013 there was a plan to develop an archives manual and also a plan to develop a web page specifically for the Archives. These initiatives have not been completed.

Nature of Archival Holdings

The holdings in the Archives Room include all media: textual records, photographic materials, audiovisual recordings (including cassette tapes, VHS tapes, CDs, and DVDs), architectural drawings, newspaper clippings, pamphlets, brochures, books and booklets, and other media.

The Archives Committee began its efforts in 2006 by removing records that had been stored in the tower. The records were unboxed and/or disorganized in the tower and so they were transported to the basement in plastic bags. Some documents were arbitrarily disposed of during the move out of the tower, before the Archives Committee could participate in decision making.

In the absence of any clear order, the records moved to the Archives room were organized roughly into chronological order, by decades and then by priest incumbent, unless a specific subject or administrative area (such as the Binney Group or the Mothers’ Union) could be identified. (Michael Smitherman noted that many groups have been active in the congregation for many years. There are three active women’s groups at the moment: the Bishop Binney Group, the Bishop Inglis Group, and the Altar Guild. The Inglis Group is mainly Lebanese, though participation in the Binney and Inglis Groups is not limited. Membership in the Altar Guild is by invitation of the Rector.)

The archival materials in these boxes – which are separate from the archives that have been given accession numbers – have not been accessioned or appraised. Michael Smitherman says his group does not know the relevance or importance of the materials and felt it best to sort them

and keep them, waiting for archival guidance about what to keep and what to remove from the collections.

In addition, the Archives Committee has accessioned a large number of other archival items and stored them in archival quality folders and boxes. These materials largely consist of artifacts, CDs and DVDs, converted from VHF tapes and cassette tapes, and volumes such as Bibles, registers and so on that the volunteers consider important to the story of St. Peter's. There is also some 16 mm CCBC film that needs to be converted.

While the Archives Committee has arranged to convert some audiovisual media to digital format, the process, through a local company, is expensive, so it is only done when funds are available.

Donations have come from local families, through appeals to members of the congregation, or as anonymous "drop off" donations on the Archives' door. The Chair is attempting to stop anonymous donations, as he has no ability to confirm the source of the materials or document the transfer. He noted he would appreciate help to formalize the donation process.

Some items in the Archives Room were originally stored in the sacristy vault. The transfer was in the presence of (then) members of the Archives Committee Canon Tuck, Pete Paton, Hugh Simpson, Michael Smitherman, and Fr. Peter Harris. Items included Boy's School registers, parish census records, and copies of wills and deeds.

An inventory of the general contents of the Archives Room is included as Document B in the SPCA Strategic Planning Project Report.

Status of Cathedral Records

Vestry minutes, annual reports, and other official records are kept in the Cathedral office. There is no formal records management policy for the Cathedral. Only a small portion of the Cathedral's more current official records have made their way into the Archives, and some obsolete records have been kept in storage. Records of baptisms, marriages, and funerals are managed by the rector, and statistics from the Cathedral are sent regularly to the Diocesan Archives in Nova Scotia.

There is no regular or formalized flow of official records into archival custody. While Vestry and Cathedral meeting minutes are transferred to archival custody periodically, as the Cathedral Secretary has the time, correspondence, reports of individual groups and committees, and other operational records are not moved to archival care.

In the 1980s, the Public Archives and Records Office seems to have microfilmed official Cathedral records, including baptism, marriage, and funeral records. The origins of this microfilming initiative are being clarified; the work seems to have been done during the time of Canon Malone.

Before appraising any official Cathedral records for their archival value, it will be important to identify any other policy instruments in place across the organization that define information,

records, and archives activities or requirements for the Cathedral, such as records that the Cathedral has to produce each year or manage according to internal policy, or provincial and diocesan requirements for recordkeeping.

An inventory of the general contents of the different Cathedral records storage areas and description of the materials on the PARO microfilm are included as Documents C and D in the SPCA Strategic Planning Project Report.

ANALYSIS

The St. Peter's Cathedral Archives is a wonderfully rich collection of historical evidence of the life of the Cathedral community from its beginnings in 1869 to the present day. The Archives Committee volunteers have done a tremendous job protecting these unique materials. They have made great strides in establishing some control over a large body of materials that previously had suffered from the ravages of time, particularly the records once stored in the Cathedral tower, many of which came into the Archives in nothing more than garbage bags. Without the efforts and energy of this volunteer team, there would very likely be no Cathedral Archives today. They are all to be commended for their dedication and perseverance.

The findings and suggestions offered now are given in that spirit: to build on this remarkable effort and find a way to make the archives program sustainable, so that it remains a valuable resource for the Cathedral, the Cathedral community, and the wider community of Charlottetown and Prince Edward Island.

The greatest strength of SPCA is twofold: first, its dedicated and energetic group of archival volunteers, and second, the rich collection of archival materials, dating back nearly 150 years. The holdings of the archives, rescued from imminent peril in the Cathedral tower and now safely housed in a high-quality Archives Room, are irreplaceable original sources of the Cathedral's history. While the provincial archives has microfilmed some vital records, notes and booklets, the real documentary evidence of the life and history of the Cathedral rests in the archival storage boxes.

A great weakness is that while the collection is extensive and rich, it is not yet arranged and described sufficiently to allow for public use, research, or outreach. The volunteers have quite rightly focused efforts on accessioning materials, storing them safely, and undertaking urgent preservation tasks to secure the items themselves from further harm. But the volunteers know that the next steps require not only manual labour but also archival expertise – with arrangement and description, digitization, the creation of online descriptive tools, and so on – which they do not have.

Thus the most significant risk to the collection comes from the lack of sustainability for archival management and the absence of archival expertise. An archival collection of this size and scope simply cannot be arranged, described, and made available for use on the strength of a handful of volunteers working a total of 4-8 hours a week among them.

While it might be possible for a mix of paid and volunteer archival support staff to maintain and provide public access to collection that has been arranged and described, relying on the current volunteers to carry out this work means (1) waiting years, if not a decade, for the current holdings to be available for public use and (2) having to seek out and train a continuous stream of new volunteers to keep efforts progressing as current volunteers step away from active involvement in the archives.

The volunteers have done a great deal of work capturing accession information and have already begun cataloguing photographs, but this information remains in handwritten form. Work on arranging and describing the holdings, and on selective digitization particularly to support upcoming anniversaries and celebrations, should be completed so that the archives are arranged, described, and made available. Only then will the materials in the St. Peter's Cathedral Archives be 'revealed' to the Cathedral community and others in Charlottetown, around Prince Edward Island, and across the country.

On the following page is a brief SWOT analysis – a summary of the strengths, weaknesses, opportunities, and threats facing SPCA – which highlights the points summarized in this analysis.

St. Peter's Cathedral Archives SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Dedicated volunteer team. • Commitment by senior management to the existence of the archives. • Good quality storage facilities with considerable room for growth. • Relatively new computer equipment and high-speed internet connection. • Formally approved archives policy and standardized accession/image catalogue forms. • Good quality archival storage conditions, including the use of acid-free and archival containers whenever possible. • Potential for advice and resources from the Diocesan Archives and other members of the archival community across Canada. • Support and respect for Archives activities from the Provincial Records and Archives Office, which sees SPCA a strong participant in the Archives Council of PEI. • Growing online presence for the Cathedral through Facebook and the website. 	<ul style="list-style-type: none"> • Limited volunteer time available, meaning that progress on archival processing is slow and continuity of service is inconsistent. • Absence of a trained archivist to assist with developing/executing archival tasks leaves volunteers without the leadership they would like and limits their ability to move projects ahead. • Limited and inconsistent IT support, limiting the ability of the Archives Committee to maximize online opportunities, including Facebook, website, digitization tools, digital archival management systems, etc. • Lack of an overarching records policy and retention and disposal guidelines. • Incomplete documentation of accessions, partly because source information is not available. • No information available about copyright, privacy, access concerns for archival materials. • Storage space in the Archives Room could be maximized with additional shelving and relocation of holdings. • Volunteers are not directly connected with archivists outside of PEI and so have limited access to resources available across Canada.
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> • <i>Funding opportunities</i>, including Young Canada Works and Documentary Heritage Communities Program. • <i>Promotional and outreach opportunities</i>, including Heritage Week (Feb 13-19/17); Archives Awareness Week (usually Apr/17 dates tbc); International Archives Day (June 9/17); Canada 150 celebrations, 2017; St. Peter's Cathedral 150th anniversary, 2019. • <i>Other opportunities</i>: potential to engage the community in 'one-off' archival support, as done in the past, such as photo identification, oral histories; engaging students in summer projects supporting various archival initiatives. 	<ul style="list-style-type: none"> • Extremely limited number of qualified archivists in PEI or the Maritimes, reducing the ability to engage the services of a part-time, contract, or consulting archivist who can work on site regularly or even intermittently at reasonable cost. • Moving to digital archival management risks shutting out current volunteers, who may find the data entry requirements more onerous. • Not moving not to digital archival management leaves St. Peter's behind the wider archival community, limiting opportunities for funding and support. • Undertaking a significant archival project but not building in sustainability (particularly human resources) risks the failure of the initiative once project funds are gone.

STRATEGIC PLAN

The following strategic plan aims to achieve the following:

- Articulate a vision, mission, and mandate for the St. Peter's Cathedral Archives.
- Define key goals over three years to support this vision, mission, and mandate.
- Outline strategic actions for achieving those goals.
- Identify responsibilities, costs, time frames and constraints on those actions.
- Recommend immediate next steps for action.

This strategic plan is structured with a primary focus on the next three years, leading up to the Cathedral's 150th anniversary in 2019. It is strongly recommended that this plan be reviewed and expanded to reach beyond 2019. Strategic initiatives that might extend beyond the three-year time frame have been identified in the plan.

VISION, MISSION, MANDATE

The following vision, mission, and mandate builds on the St. Peter's Cathedral Archives Policy Statement, which was first developed in March 2010 and reviewed by Vestry in 2015.

Vision

St. Peter's Cathedral Archives is the documentary memory of the Cathedral community for the past, present, and future, actively acquiring, preserving, and making available not only the historical archives of the Cathedral but also current Cathedral records and archival materials from and about the wider Cathedral community.

Mission

St. Peter's Cathedral Archives serves all members of the Cathedral community as well as the wider public by effectively managing, acquiring, preserving and making available documentary evidence of the life and activities of the Cathedral, in all forms and media, including both official Cathedral records and information and archives from the community that help document the lives and work of people and groups associated with the Cathedral.

Mandate

St. Peter's Cathedral Archives exists to

1. Collect and preserve archival materials which illustrate the growth and development of the Cathedral or which pertain in whole or in part to Cathedral activities within the parish and province, including both official Cathedral records and relevant archival materials from the wider community,

2. Arrange and describe these materials according to archival principles and make them accessible to researchers, unless access is restricted by legal requirements or by written agreement with the donor,
3. Provide adequate and appropriate conditions for the storage, protection, and preservation of archival material,
4. Provide advice and guidance to the Cathedral on effective records and information management, in order to ensure the protection of official records with enduring value and the safe disposal of obsolete information,
5. Provide reference services to individuals and groups interested in the holdings and activities of the Archives,
6. Provide educational and outreach programming whenever possible to increase public awareness of the Cathedral's history, development, and activities.

GOALS 2017-2019

In order to support the vision, mission, and mandate articulated above, St. Peter's Cathedral will strive to achieve key outcomes in the following twelve areas of archival service over the next three years.

- | | |
|---|--|
| 1. Policy and governance framework | 7. Arrangement and description |
| 2. Human resources | 8. Privacy, access, and intellectual property controls |
| 3. Financial resources | 9. Digitization |
| 4. Facilities, supplies, equipment, technology | 10. Reference and user services |
| 5. Preservation conditions and environmental controls | 11. Engagement and outreach |
| 6. Acquisition, appraisal, and accessioning | 12. Management of current records and data |

Specific goals are identified below for each of these areas, followed by strategic actions intended to help St. Peter's Cathedral achieve those goals.

Note: This strategic plan addresses the needs of St. Peter's Cathedral and its archives. However, the documentary evidence generated by St. Peter Publications – a separate entity closely aligned with the Cathedral – should be considered as appropriate when identifying specific actions for records, information, and archives management.

Areas of Service and Key Goals

<i>Area of Archival Service</i>	<i>Key Goals</i>
1. Policy and governance framework	SPCA operates as an ongoing service, governed by a formal and clear policy and governance structure within the Cathedral.
2. Human resources	SPCA is staffed by paid or volunteer archivists, trained in SPCA operations and systems, whose presence allows the Archives to open for archival work and public use at least two days a month.
3. Financial resources	SPCA is supported by a consistent, sufficient, and dedicated budget for supplies, equipment, environmental protection and other expenses.
4. Facilities, supplies, equipment, technology	The SPCA's facilities and supplies meet best practice archival requirements, and all equipment and technology is kept in good working order and up to date, in order to support high-quality archival service.
5. Preservation conditions and environmental controls	SPCA follows best practice archival requirements for preservation and environmental controls as much as possible and monitors conditions regularly to identify areas requiring mitigation.
6. Acquisition, appraisal, and accessioning	SPCA follows institutional policies and guidelines for acquisition, appraisal, and accessioning, to ensure it obtains legal ownership and control of all holdings whenever possible.
7. Arrangement and description	SPCA follows best practice archival standards and guidelines for arrangement and description and plans and executes arrangement and description initiatives in accordance with strategic priorities, to support both intellectual and physical control of holdings.

Areas of Service and Key Goals

<i>Area of Archival Service</i>	<i>Key Goals</i>
8. Privacy, access, and intellectual property controls	SPCA follows institutional policies and guidelines for the acquisition, management, and dissemination of holdings in order to abide by federal, provincial, Cathedral or other laws or policies intended to provide access while respecting personal privacy and intellectual property rights. Whenever possible, SPCA confirms and/or obtains copyright or intellectual property rights for any acquisitions of archival material from external sources.
9. Digitization	SPCA follows archival and preservation standards and guidelines for digitization and plans and executes digitization initiatives in accordance with strategic priorities, to support both intellectual and physical control of holdings.
10. Reference and user services	SPCA provides in-person, telephone, mail, and online reference and user services based on archival standards and guidelines, with the intention of making the Archives' holdings available as widely as possible. To meet this goal, the Archives is open for archival work and public use at least two days a month.
11. Engagement and outreach	SPCA works with the Cathedral to carry out archives-related engagement and outreach initiatives regularly and to participate actively in community events, in order to increase public awareness of the Cathedral's history, development, and activities. Specifically, the SPCA prepares exhibits, displays, and information resources to help the Cathedral celebrate and promote its 150 th anniversary in 2019.
12. Management of current records and data	SPCA works with all representatives of St. Peter's Cathedral to support the effective management of the Cathedral's official records, information, and data, regardless of form, to support accountable, effective operations and to ensure that the Cathedral's documentary evidence is protect for the present and future.

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>1. Policy and governance framework</p> <p><i>SPCA operates as an ongoing service, governed by a formal and clear policy and governance structure within the Cathedral.</i></p> <p>The SPCA should operate within a formal policy and governance framework, as an ongoing service within the Cathedral, responsible not just for archives management but also for supporting effective records and information care across the Cathedral.</p> <p>Many policies will be developed as required, but the Archives Policy, as the core enabling policy, should be reviewed in light of this strategic plan and revised as needed.</p>	<p>1a: Confirm and formalize the governance structure for the Archives as needed.</p>	<p>The Archives Committee reports to Vestry; this relationship should be confirmed and the ownership and control of the Archives as an asset of the Cathedral should be clarified.</p>	
	<p>1b: Review, revise, and adopt the SPCA vision, mission, mandate.</p>	<p>The vision, mission, and mandate articulated in this strategic plan should be reviewed, revised, and confirmed, and the statements should be incorporated into the Archives' policy.</p>	
	<p>1c: Review, revise, and adopt the SPCA Archives' policy.</p>	<p>The policy was reviewed and approved in 2015 but should be reviewed and revised in light of this 2017 strategic plan, with vision, mission, and mandate statements and clarification of governance structures included. Suggested revisions were provided to the Archives Committee by the project consultant for consideration in January 2017.</p>	
	<p>1d. Develop additional policies as outlined in this strategic plan.</p>	<p>Additional policies, procedures, and operational guidance should be developed to support sustainable archival operations. This policy development should be carried out by a contract archivist funded by DHCP funds, as proposed. As policy development is an ongoing activity in any archives, this work should be considered a continuing responsibility.</p>	
<p>Responsibility: Archives Committee, Vestry, Cathedral membership, Contract Archivist.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>2. Human resources</p> <p><i>SPCA is staffed by paid or volunteer archivists, trained in SPCA operations and systems, whose presence allows the Archives to open for archival work and public use at least two days a month.</i></p> <p>The short-term goal for the SPCA should be to secure the services of a qualified Contract Archivist and then a Cathedral Archivist. The Contract Archivist will establish best practice archival operations, building on the work done by the archival volunteers so far, and create an environment where SPCA volunteers, the Cathedral Archivist, and other staff or students can maintain quality services with only intermittent external support.</p> <p>Note that YCW funding requires matching funds from the applicant. The Cathedral Vestry would need to decide if it can provide the resources to secure this grant funding.</p> <p>The long-term goal should be create the structure to allow for the SPCA to be operational (for archival service and public reference) <u>at least</u> two days a month, if not more. This service can be provided by a mix of paid and volunteer staff, as appropriate; the DHCP application identifies a particular configuration of staff and volunteers to support key archival goals.</p>	<p>2a. Apply for DHCP funding to secure a contract archivist for 2017-2018, 2018-2019 and a cathedral archivist starting later in 2017-2018 and continuing into 2019, to remain with the Cathedral on an ongoing basis after the project ends.</p>	<p>An application for a two-year cycle of DHCP funding should be completed by January 27, 2017 and a contract archivist – full-time, part-time, or on an intermittent basis as appropriate to funding received – should be engaged as soon as funds are secured to carry out priority actions identified in this strategic plan. A Cathedral</p>	
	<p>2b. Apply for Young Canada Works (YCW) or other federal, provincial, or municipal funds if appropriate to support and expand on DHCP-funded archival activities.</p>	<p>If the DHCP funding is secured and a contract archivist engaged, additional funding could be secured from YCW or other funding sources to hire an archival intern, specifically to work on arrangement, description, and digitization under the supervision of the contract archivist. The next funding deadline is March 16, 2017.</p> <p>Decisions about whether to apply for this funding in 2017, 2018, or at all should be made by the Archives Committee and Vestry with regard to their sense of the Cathedral’s capacity to manage two additional contract staff for archival work.</p>	
	<p>2c. Apply for federal, provincial, or municipal funds to serve as the primary source of archival support in the event the DHCP application is not successful.</p>	<p>If the DHCP funding is not secured, the another contractor such as a student or intern funded through YCW or other funds could serve as the primary project archivist. Decisions about whether to apply for such funding will need to be made by the Archives Committee and Vestry with regard to the Cathedral’s capacity to manage a relatively junior archival intern without senior professional guidance. A steering committee could be established to provide oversight and supervision.</p>	

Strategic Actions, 2017-2020

<p>Ideally there will be a part-time Cathedral Archivist brought in with start-up funding from a grant and then sustained through funding from the Cathedral. The high level of staff inputs in a grant program will allow the Cathedral Archives to be formalized and the backlog processed, and for a part-time archivist (the Cathedral Archivist) to be trained, allowing the grant funding to decrease as services are formalized as part of Cathedral operations.</p> <p>Training and monitoring processes should be developed to ensure quality control.</p>	<p>2d. Plan a long-term funding strategy to engage a mix of paid and volunteer archival staff to maintain archival services from 2018 on, assuming DHCP funding is successful for 2017-2018.</p>	<p>Engaging a paid staff member (perhaps someone trained from the volunteer ranks or a local university graduate) two days a month and bringing in additional volunteers might cost the Cathedral \$375/month or \$4125 a year (assuming maximum \$25/hr x 7.5 hrs. x 2 days x 11 months, with no benefits). Additional funds may be needed for periodic quality control. Grant funding may be an option.</p>
<p>Responsibility: Archives Committee, Vestry.</p>		

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>3. Financial resources</p> <p><i>SPCA is supported by a consistent, sufficient, and dedicated budget for supplies, equipment, environmental protection and other expenses.</i></p> <p>Staff costs are covered under Item 2 above.</p> <p>The Cathedral has devoted considerable resources to archival storage containers, which is a tremendous benefit to the security of the collection.</p> <p>Additional supplies will be needed to store archives still awaiting processing. Ongoing costs will be incurred, even once the backlog is processed, to store incoming materials, including official Cathedral archives and donations from private sources.</p> <p>Computer equipment and technology will be an ongoing expense. Current equipment may need to be upgraded soon to accommodate archival work; equipment will need to be maintained and upgraded periodically as needed.</p>	<p>3a. Include costs for computer equipment and archival supplies in DHCP funding application.</p>	<p>The DHCP guidelines include as eligible “costs associated with the purchase or rental of equipment and software for the purpose of conversion, digitization, preservation, cataloguing.” but not “capital expenditures (related to fixed assets).” It is assumed computer equipment and archival supplies are eligible expenses but shelving is not.</p>	
	<p>3b. Raise funds for and purchase shelving for archival holdings.</p>	<p>While additional shelving will be a valuable addition to the Archives Room, the actual installation of shelving could wait until a contract archivist has been engaged and can estimate best use of space and plan shelving and storage needs. However, fundraising could begin as early as 2017 for long-term archival support, including shelving, staffing, and so on. The goal should be to have the shelving in place by the end of 2018.</p>	
	<p>3c. Estimate financial resources required for Archives maintenance and allocate a specific budget to the Archives in order to monitor these costs, and identify appropriate sources of funding.</p>	<p>It is assumed that the costs of ongoing maintenance of the Archives Room, including heat, light, cleaning, dehumidification and general facilities care, will continue to be paid as part of overall Cathedral maintenance. Costs should be identified and tracked on an ongoing basis to monitor changes and needs.</p>	

Strategic Actions, 2017-2020

<p>Planning for computer purchases should be coordinated with information technology needs for the Cathedral, in case cost savings can be achieved through coordinated purchases or service agreements.</p> <p>Additional shelving would allow the Archives to maximize storage space. Funds for heat, light, cleaning, dehumidification, and general facilities care need to be factored into long-term plans.</p>	<p>3d. Estimate financial resources required for ongoing maintenance and periodic upgrading of computer systems and services for the Archives, including offsite storage, Internet access, etc., and identify appropriate sources of funding.</p>	<p>It is assumed that the costs of ongoing maintenance of computer systems and services will continue to be paid as part of overall Cathedral maintenance. Costs should be identified and tracked on an ongoing basis to monitor changes and needs.</p>
<p>Note that it is not possible to obtain replacement insurance coverage for actual archival contents, but it is possible to obtain insurance for the cost of restoration, repairs, or emergency services in the event that the Archives Room or the holdings are damaged or placed at risk. Existing insurance policies should be reviewed first to determine what coverage might be available for the Archives Room. The cost of such insurance may be prohibitive.</p>	<p>3e. Investigate and, if desired, secure insurance coverage for restoration of archival holdings or repairs to Archives Room in the event of an emergency.</p>	<p>The Archives Committee and Vestry may wish to investigate obtaining insurance coverage. The contract archivist can help calculate costs of replacement for storage containers or restoration or repair of holdings, equipment, or facilities, including computer equipment.</p>

Strategic Actions, 2017-2020

<p>The question of revenue for archival services needs to be researched; bearing in mind that archival operations are not normally revenue generators and that the SPCA will need to balance the right to receive funds to support cost-recovery of services with its obligations to respect donor wishes and copyright and intellectual property requirements.</p>	<p>3f. Investigate appropriate options for revenue generation and cost-recovery for archival services.</p>	<p>The Contract Archivist can assist the Archives Committee and Vestry with considering possible sources of revenue, including charging for photocopying, photographic printing, research services beyond an acceptable minimum, and so on. The costs of such services would also need to be factored in (such as the cost of acquiring necessary equipment or supplies). Decisions about cost-recovery and revenue generation will evolve as the Archives' services expand.</p>
<p>Responsibility: Archives Committee, Vestry, Contract Archivist.</p>		

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>4. Facilities, supplies, equipment, technology</p> <p><i>The SPCA’s facilities and supplies meet best practice archival requirements, and all equipment and technology is kept in good working order and up to date, in order to support high-quality archival service.</i></p> <p>Costs for facilities, supplies, equipment, and technology are covered under Item 3 above.</p> <p>The SPCA will strive to meet best practice archival requirements, particularly for such tasks as arrangement, description, and digitization. To achieve this goal the SPCA will not just ensure equipment and technology is up to date but will also select software and tools that balance the needs of archival management with the importance of engaging the Cathedral community. Training and guidance resources for archival software programmes or other tools and technologies should be developed whenever needed, to ensure that volunteers and members of the Cathedral community can remain active participants in the work of the Archives.</p>	4a. Research and select appropriate software and hardware for archival arrangement, description, digitization, and digital storage.	The contract archivist should undertake this research as a top priority when starting work at the SPCA.	
	4b. Install software and hardware, test all systems, and document all computer resources for warranty, insurance, and management purposes.	The contract archivist will be responsible for the installation of equipment, with the help of information technology specialists as needed.	
	4c. Develop training and guidance resources for the use of any software programmes (as well as archival procedures) so that volunteers and other members of the Cathedral community can remain actively involved with archival work.	As archival systems are developed the contract archivist will produce written procedures, guidelines, and training tools to support the use of these systems by as many people within the Cathedral community as possible. The contract archivist will also provide introductory and refresher training as needed.	
	4d. Ensure sufficient resources are available, especially to maintain and upgrade computer equipment, software, and related technologies and services as needed.	The Archives Committee and Vestry will need to ensure that sufficient funds are available to maintain and upgrade all facilities, supplies, equipment, and technology over time.	
	4e. Provide information technology support to ensure computer systems, equipment, and technology can be maintained effectively.	If possible, a member of the Cathedral community with information technology expertise could be identified as a volunteer support person, to provide periodic assistance with upgrades, maintenance, and other technology issues.	
<p>Responsibility: Contract Archivist, Archives Committee, Vestry, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>5. Preservation conditions and environmental controls</p> <p><i>SPCA follows best practice archival requirements for preservation and environmental controls as much as possible and monitors conditions regularly to identify areas requiring mitigation.</i></p> <p>Costs for supplies and equipment to support environmental protection are covered under Item 3 above.</p> <p>High quality preservation conditions and environmental controls are essential to the long-term stability of archival materials.</p> <p>Currently the Archives Room is heated with space heaters in the winter, and a dehumidifier is operational at all times.</p> <p>The current holdings of the Archives are well stored, but additional storage containers and supplies will be required on an ongoing basis, particularly for the processing and storage of archives as part of the DHCP project.</p>	5a. Continue to monitor environmental conditions regularly.	Temperature and relative humidity should be logged regularly, ideally at least once a week. Logging data has apparently been gathered in past years; this data should be consolidated with new data to maintain a long-term record of environmental conditions. This is an ongoing activity.	
	5b. Clarify best options for heating, cooling, and dehumidifying the Archives Room and maintain services.	Reviewing conditions will confirm if they are appropriate and cost-effective options. Any required changes to heating, cooling, or dehumidifying could incur additional costs, to be included in financial planning.	
	5c. Continue to ensure the Archives Room is dusted, cleaned, and maintained appropriately for the safety and security of the collections and the health and welfare of anyone working in the space.	Regular cleaning should continue to be carried out. This is an ongoing activity.	
	5d. Continue to use archival-quality storage containers whenever feasible for the protection of archival materials.	Continued use of archival-quality supplies and storage containers is an ongoing activity and expense.	
	5e. Develop, implement, and maintain a disaster recovery plan.	The Contract Archivist should develop a disaster recovery/emergency management plan in consultation with the Cathedral.	
<p>Responsibility: Archives Committee, Contract Archivist, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>6. Acquisition, appraisal, and accessioning</p> <p><i>SPCA follows institutional policies and guidelines for acquisition, appraisal, and accessioning, to ensure it obtains legal ownership and control of all holdings whenever possible.</i></p> <p>Formal acquisition policy and clear accession procedures are essential to archival management. Existing procedures should be reviewed and revised to ensure they are as robust as possible.</p> <p>An acquisition strategy should be developed to identify sources of archival donations from the Cathedral community or the wider Prince Edward Island population. It is possible this strategy might include expanding the SPCA's mandate to include support for the preservation of church archives across Prince Edward Island, but this decision should be made with full input from all stakeholders, including the Diocesan Archives in Halifax, PARO, and the PEI Archives Council.</p>	6a. Develop, implement, and maintain a formal acquisition policy.	The Contract Archivist and Archives Committee should develop a formal acquisition policy, separate from the Archives Policy, to govern the scope of acquisitions and clarify SPCA rights and responsibilities.	
	6b. Review and revise accession procedures and then implement and maintain them.	Existing procedures for accessioning can be more robust, particularly to identify the creator of archival materials and the donor or source. A revised accession form was developed for the Archives Committee by the archives consultant in January 2017.	
	6c. Develop, implement, and maintain deaccessioning policies and procedures.	Procedures for deaccessioning are necessary, in order to document all decisions appropriately and ensure donor's rights are respected. Deaccessioning policies should be incorporated with the acquisition policy, and procedures with the accessioning procedures. The Contract Archivist should address deaccessioning as part of the development of an acquisition policy. No deaccessioning should take place at the moment.	
	6d. Develop, implement, and maintain an acquisition strategy.	An acquisition strategy should be developed by the Contract Archivist and the Archives Committee.	
<p>Responsibility: Archives Committee, Contract Archivist.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>7. Arrangement and description</p> <p><i>SPCA follows best practice archival standards and guidelines for arrangement and description and plans and executes arrangement and description initiatives in accordance with strategic priorities, to support both intellectual and physical control of holdings.</i></p> <p>Arrangement and description should follow best-practice archival standards.</p> <p>Once standards are confirmed, appropriate software for description and dissemination should be researched and selected.</p> <p>Once standards and tools are confirmed, priorities for arrangement and description should be identified to maximize strategic priorities for preservation, engagement, and outreach.</p> <p>Depending on preservation needs, it is useful to consider prioritizing the description of specific holdings, to make content available for anniversaries, celebrations, exhibits, or special events over the next few years.</p>	<p>7a. Formally adopt best-practice standards for archival arrangement and description.</p>	<p>The Contract Archivist should research and select appropriate standards. In Canada, the descriptive guidelines Rules for Archival Description are considered the standard for archival description. However, other standards have been developed, including the international standard ISAD (G) and the new standard (RiC), currently in development.</p>	
	<p>7b. Research and select archival software for the development and dissemination of archival descriptions.</p>	<p>The Contract Archivist should research and select appropriate software for description and dissemination. A current tool is AtoM, which is being used by the PEI Archives Council and other institutions across Canada. However, other tools should also be considered.</p>	
	<p>7c. Identify priorities for arrangement and description, based on strategic needs.</p>	<p>The Contract Archivist should work with the Archives Committee and Cathedral community to identify priorities for arrangement and description, particularly to support specific outreach or engagement initiatives such as Canadian and Cathedral anniversaries and celebrations in 2017 and 2019.</p>	
	<p>7d. Develop and implement procedures for arrangement and description. Incorporate ongoing arrangement and description tasks into work plan as a continuing archival task.</p>	<p>The Contract Archivist should begin arrangement and description, including developing procedures that support the involvement of members of the Archives Committee or other archival staff and volunteers, so that the workload is spread out and training is made available as widely as possible.</p>	
<p>Responsibility: Archives Committee, Contract Archivist.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>8. Privacy, access, and intellectual property controls</p> <p><i>SPCA follows institutional policies and guidelines for the acquisition, management, and dissemination of holdings in order to abide by federal, provincial, Cathedral or other laws or policies intended to provide access while respecting personal privacy and intellectual property rights. Whenever possible, SPCA confirms and/or obtains copyright or intellectual property rights for any acquisitions of archival material from external sources.</i></p> <p>The Cathedral does not appear to have a legal obligation to adhere to provincial or federal access and privacy laws, but it does have a responsibility to respect copyright and intellectual property laws.</p> <p>The primary concern with copyright and intellectual property requirements rests with materials created and owned by individuals or groups other than the Cathedral itself.</p>	<p>8a. Research Cathedral obligations for privacy, access, and intellectual property controls.</p>	<p>The Contract Archivist and Vestry should research and confirm Cathedral obligations, not only for archival materials but also for any official Cathedral records and data.</p>	
	<p>8b. Develop and implement policies and procedures for identifying and administering privacy, access, and intellectual property requirements on a ‘this day forward basis’ as needed. Incorporate access and privacy administration into work plan as continuing archival tasks.</p>	<p>The Contract Archivist and Vestry should develop and implement appropriate policies and procedures applicable both to official records and data and to archival materials in the custody of the Archives.</p>	
	<p>8c. Undertake retroactive identification of intellectual property requirements for archival materials.</p>	<p>Heretofore, the SPCA has not documented the sources of archival holdings in detail, which means that research will be required to clarify ownership and copyright conditions for a portion of the Archives’ collection.</p> <p>The Contract Archivist should work with the Archives Committee to identify any high-risk materials, particularly in relation to potential privacy, copyright, or intellectual property rights, and manage those materials to protect privacy and other personal rights of donors, records creators, or subjects documented in the archives.</p>	^
<p>Responsibility: Archives Committee, Vestry, Contract Archivist, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>9. Digitization</p> <p><i>SPCA follows archival and preservation standards and guidelines for digitization and plans and executes digitization initiatives in accordance with strategic priorities, to support both intellectual and physical control of holdings.</i></p> <p>Costs for supplies and equipment required for digitization are covered under Item 3 above.</p> <p>There is no one clear standard for digitization. The Society of American Archivists, the Smithsonian Institution, Library and Archives Canada, and the Canadian Heritage Information Network (CHIN) all provide some guidance on digitization requirements on their websites.</p> <p>Technical requirements for digitization must be investigated before scanning equipment is selected, as there is a wide range of quality in scanners and in storage devices for scanned digital content. The Contract Archivist needs to prioritize research in this and other areas that result in the purchase of computer equipment and technology.</p>	9a. Research, identify and/or develop and adopt best-practice requirements for digitization of holdings.	The Contract Archivist should research and select appropriate requirements and guidelines.	
	9b. Research and select archival software and hardware for digitization.	The Contract Archivist should research and select appropriate software and hardware for digitization.	
	9c. Identify priorities for digitization, based on strategic needs.	The Contract Archivist should work with the Archives Committee and Cathedral community to identify priorities for digitization, particularly to support specific outreach or engagement initiatives such as Canadian and Cathedral anniversaries and celebrations in 2017 and 2019.	
	9d. Develop and implement procedures for digitization. Incorporate ongoing digitization activities into work plan as a continuing archival task.	The Contract Archivist should begin digitizing, including developing procedures that support the involvement of members of the Archives Committee or other archival staff and volunteers, so that the workload is spread out and training is made available as widely as possible. Ongoing digitization should then be carried out as a core archival task.	
<p>Responsibility: Archives Committee, Contract Archivist, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>10. Reference and user services</p> <p><i>SPCA provides in-person, telephone, mail, and online reference and user services based on archival standards and guidelines, with the intention of making the Archives' holdings available as widely as possible. To meet this goal, the Archives is open for archival work and public use at least two days a month.</i></p> <p>Costs for supplies or equipment for reference services are covered under Item 3 above.</p> <p>A formal framework for reference services will include clarifying such issues as: opening days and hours; identification requirements for users; terms and conditions of research use; privacy, access, and copyright conditions (as identified in Item 8 above); charges and fees for services provided; provision of services to persons with limitations on access (mobility issues etc.); dealing with user requests and concerns; and staffing levels and training needs (volunteers, Archives Committee members, archival staff).</p> <p>The timing of public opening or the launch of websites should be coordinated with anniversaries or celebrations as possible.</p>	<p>10a. Establish policies and procedures for on-site, telephone, mail, and online reference services.</p>	<p>The Contract Archivist should work with the Archives Committee to establish a formal framework for reference services.</p>	
	<p>10b. Develop tools and resources to support reference services as identified in the framework, including training for archival staff and volunteers to ensure continuity of service after the Contract Archivist's term expires.</p>	<p>The Contract Archivist should work with the Archives Committee and Vestry to develop reference tools and resources, including creation of a web page within the St. Peter's Cathedral website, or a separate website, to support online access to information about the Archives' operations and holdings.</p>	
	<p>10c. Decide a formal opening date for regular public access to the Archives' Room and open the SPCA to public use accordingly. Incorporate ongoing reference services into work plan as a continuing archival task.</p>	<p>The Contract Archivist should work with the Archives Committee and Vestry to develop a plan for formally opening the Archives Room to public use. The date chosen for should be decided when the Contract Archivist has undertaken enough preparatory work to support the provision of useful in-person reference services.</p>	
	<p>10d. Decide a formal launch date for the Archives' website or online resources and launch the resources accordingly. Incorporate ongoing maintenance of web and online resources as a continuing archival task.</p>	<p>The Contract Archivist should work with the Archives Committee and Vestry to develop a plan for launching online services. The date chosen for should be decided when the Contract Archivist has undertaken enough preparatory work to support the online reference services.</p>	
<p>Responsibility: Archives Committee, Contract Archivist, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>11. Engagement and outreach</p> <p><i>SPCA works with the Cathedral to carry out archives-related engagement and outreach initiatives regularly and to participate actively in community events, in order to increase public awareness of the Cathedral’s history, development, and activities. Specifically, the SPCA prepares exhibits, displays, and information resources to help the Cathedral celebrate and promote its 150th anniversary in 2019.</i></p> <p>Initiatives might include:</p> <ul style="list-style-type: none"> • Digital or physical exhibits about the Cathedral’s history in relation to Canadian Confederation (for 2017) or the Cathedral’s anniversary in 2019. • Publication of the second volume of the history of the Cathedral, drawing on archival sources. • Oral history or photograph identification projects with members of the Cathedral community. • Support for the creation of audio tours of the Chapel or accompanying brochures or resources. 	<p>11a. Identify priorities for engagement and outreach, based on strategic needs.</p>	<p>The Contract Archivist should work with the Archives Committee and Cathedral community to identify priorities for engagement and outreach, including specific activities to coordinate with Canadian and Cathedral anniversaries and celebrations in 2017 and 2019.</p>	
	<p>11b. Develop and implement actual engagement and outreach initiatives. Incorporate ongoing engagement activities into work plan as a continuing archival task.</p>	<p>The Contract Archivist should work with the Archives Committee and Cathedral community to develop actual engagement and outreach initiatives, such as those suggested here.</p>	
	<p>11c. Develop and implement online resources and social media plans for engagement and outreach and for promoting in-person events or other activities. Incorporate ongoing social media activities into work plan as a continuing archival task.</p>	<p>The Contract Archivist should work with the Archives Committee and Cathedral community to develop online resources to support engagement and outreach, such as virtual exhibits on a Cathedral Archives’ website. The Contract Archivist could also work with the Archives Committee and Cathedral community to consider expanding other social media tools, such as Facebook and other resources, to support increased engagement, outreach, publicity, and promotion.</p>	
<p>Responsibility: Archives Committee, Vestry, Cathedral membership, Contract Archivist, archival staff and volunteers.</p>			

Strategic Actions, 2017-2020

<i>Area of Archival Service and Key Goals</i>	<i>Actions</i>	<i>Comments</i>	2
<p>12. Management of current records and data</p> <p><i>SPCA works with all representatives of St. Peter's Cathedral to support the effective management of the Cathedral's official records, information, and data, regardless of form, to support accountable, effective operations and to ensure that the Cathedral's documentary evidence is protect for the present and future.</i></p> <p>A formal framework for records and information management for the Cathedral will include the development of policies and procedures for information and records management; the creation of retention and disposal schedules. The framework will also identify records of committees or groups and ensure they are protected as evidence of Cathedral activities.</p> <p>While the Contract Archivist may have the expertise to support the development of this framework, this work will not fall within the parameters of grant funding. Any support provided from the Contract Archivist will have to be as a separate or volunteer initiative.</p>	<p>12a. Develop and implement a records and information management policy.</p>	<p>The Cathedral should develop and implement a formal policy to confirm that all official Cathedral records and data will be managed for accountability and efficiency, and with their archival value in mind.</p>	
	<p>12b. Develop and implement records and information management procedures. Incorporate ongoing records management activities into work plan as a continuing task.</p>	<p>The Cathedral should develop and implement core procedures for the management of Cathedral records and data, including the records of committees and groups. These procedures should identify who has official copies, how they should be transferred into Cathedral custody, how and when electronic records will be backed up, how and where physical records will be stored, which records are vital or contain personal information and how they will be managed, and so on.</p>	
	<p>12c. Develop and implement retention and disposal schedules. Incorporate regular disposal practices into work plan as an archival task.</p>	<p>The Cathedral should develop and implement retention and disposal schedules, which identify which records to retain and for how long and which records to dispose of and when, along with privacy, security, or access requirements.</p> <p>Considerable relevant guidance already exists for church records management, including from the Diocesan Archives in Nova Scotia. Those resources will help streamline this work.</p>	
<p>Responsibility: Vestry, Contract Archivist.</p>			

RISKS AND CONTINGENCIES

The success of this strategic plan depends heavily on securing DHCP funding for 2017-2018 and 2018-2019. In the event this application is not successful, the Cathedral will need to consider other options and scale back plans considerably. The following actions should be taken.

Action	Responsibility	Deadline
Apply for YCW funding.	Vestry	Mar 16/17
Identify advisory board for YCW project if appropriate.	Vestry	Mar 16/17
Review strategic plan and determine priority activities based on different level of funding and archival support.	Vestry and Archives Committee	Spring / 17

In the event the Young Canada Works funding is not successful, the following actions should be taken.

Action	Responsibility	Deadline
Identify and apply for other sources of federal, provincial, or municipal funding if appropriate.	Vestry and Archives Committee	Spring /17
Review strategic plan and determine priority activities based on different level of funding and archival support.	Vestry and Archives Committee	Spring /17

Ultimately, the sustainability of archival services, and the security of the archival collection, will depend on the continuing support of the Cathedral community for its archival legacy. The goal of providing two active ‘open’ days of archival service – which would support research and public use in person and facilitate continued arrangement, description, preservation, and other tasks – should be seen as a minimum outcome of the work that could be carried out as part of this strategic plan.

It is hoped that the Cathedral community will continue to support archival work, by applying for further grants as needed, by increasing and diversifying its volunteer network, and by maintaining quality control through periodic “check-ups” to ensure archival principles and practices remain consistent and of high quality.

Thus the ultimate vision for this strategic plan is not simply to “gain intellectual and physical control” over a body of archival materials but, more importantly, to help make the Cathedral’s archival collection a vibrant and dynamic component of the life of the Cathedral community and the people of Prince Edward Island.