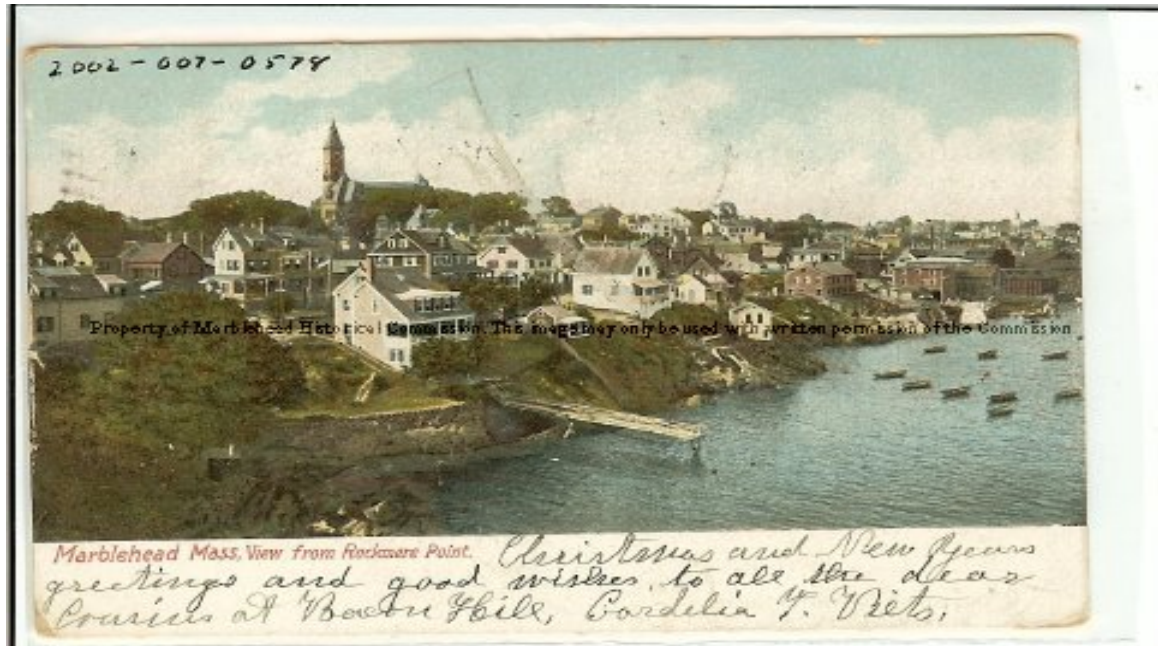


Phase I Report



Archival Study for the Town of Marblehead

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Submitted to the Marblehead Historical Commission
and the Town of Marblehead, Massachusetts

Archival Study for the Town of Marblehead

Preliminary Report

Sponsors

Town of Marblehead

Marblehead Historical Commission

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Section 1: Executive Summary

Section 2: Background

The Marblehead Historical Commission and the Town of Marblehead have taken the first steps to determine the requirements and logistics to establish a shared archival facility to preserve and make accessible these invaluable resources. Funded by a donation made by Ross and Rita Terrien to establish a repository for the Town of Marblehead's historical documents and records, the yearlong archival study has five overall goals that have been divided into five project phases:

1. Determine the partners - organization selection.
2. Determine the organizational requirements for a shared archival facility.
3. Determine the programmatic requirements for a shared archival facility.
4. Evaluate potential sites for a future archival facility.
5. Prepare a Master Plan to create a town-wide archival facility.

In May 2017, Marblehead hired archival consultant Michele F. Pacifico to conduct the archival study. After background research, Michele made her first visit to Marblehead from July 9 to July 12, 2017. This is the first preliminary report of the project. It will examine the potential partners for a Marblehead Archival Facility, review models of other Town Archives, and discuss the issues and factors to be considered in selecting partner organizations and in moving forward with the planning.

Section 3: Cooperation as an Archival Strategy

Cooperation and collaboration among American archival institutions have increased over the last several decades. More typical areas of cooperation have included the development of standards for archival description and the creation of digital collections that allow researchers to view collections from multiple institutions online.

Cooperation has more recently expanded to include the sharing of archival facilities. This trend is likely to continue. Because of the specialized nature of archival facilities and their high initial and operational costs, building sharing is a viable alternative for archives located within a town or geographic region.

Marblehead is wise to consider a shared facility to preserve and make accessible their invaluable historic collections. At a lower cost, a single shared facility offers energy efficiencies, an environmentally sustainable structure, cohesive access to the collections, and can result in a transformative collaboration for the town's archival institutions.

Section 4: Potential Partners/Potential Collections

The numerous archival institutions of Marblehead hold a variety of archival materials, including textual records, architectural drawings, maps, photographs, posters, recordings, films, microfilms, art, artifacts and furniture. Marblehead's archival records date from the 1600's, and they document the history of the Town, its government, its organizations, its churches, and its citizens. Included are the earliest charters, agreements, land records, maps, surveys, and governance documents.

At this stage of the project, 14 Marblehead institutions were interviewed. The consultant, Michele Pacifico, and Chris Johnston of the Historical Commission met with representatives, reviewed the

records and their storage areas, and took photographs. An additional 3 institutions were interviewed by Johnston and they provided details on their records by email. In total, there are potentially over 40 Town institutions that can be considered for inclusion in the project.

Section 5: Case Studies - Cooperative Archival Facilities

The project consultant interviewed or researched a number of existing town archival facilities in Massachusetts, ranging from solely public archives to shared public/private archival programs. In addition, the consultant drew on past studies of shared archival facilities located throughout the United States and Canada. Partnerships in these studies ranged from one room archives to shared buildings that included archives, museum, and library holdings.

Studies of existing cooperative archival facilities offer insights into many of the issues and concerns that the Town will encounter when developing a shared facility, including agreements, funding, management, and operations. These studies illustrate the many decisions, compromises and agreements that are required for a successful partnership.

Section 6: Characteristics of Shared Facilities

Shared archival facilities require enlightened leaders and a shared vision. The proposed Marblehead Partnership reflects the mutual needs for more and better storage space, better access, and improvements in preservation and service. A cooperative building offers the opportunity for expanded functions and services. Successful shared buildings are the result of active and enthusiastic leaders, boards, committees, and staff members.

Communication and early planning are key components in creating a common vision and must be a central value for all of the partners. Collaboration, respect, support and commitment should take place at all organizational levels for the entire planning project.

Section 7: Agreements

The surveys of shared archival facilities uncovered a variety of agreements that reflect the relationship of the partners and the types of shared spaces. Some agreements are annual while others are valid for up to twenty-five years. The Marblehead partners need to establish critical agreements in their early planning stages. The first agreement, the Letter of Intent, will determine the potential partners and project participants. Further agreements are needed for facility ownership, facility management, funding, archival policies and procedures, services, terms of custody, and access of the records. Broad support, and decisive plans and agreements that are made early in the process, are important if the Town wishes to pursue grant funding by next year.

Section 8: Issues and Questions

Developing any new facility challenges operations, procedures, and assumptions and requires rethinking the way institutions work. The prospects of sharing an archives program raise many issues and questions that the Marblehead partners need to evaluate, discuss and resolve. Policies, procedures, rules and unwritten rules will suddenly be open to questions and debate. However, with good communication and a sense of humor, the outcome will be new ideas and consensus for improvements and solutions that result in a successful partnership and a shared facility.

The Archives Advisory Committee should begin to discuss and develop the common policies and procedures needed to guide the facility's design and operation. This section will help the partners to look ahead to the many questions that require discussion and decisions.

Section 9: Next Steps

All of the Marblehead archival institutions participating in this project require an appropriate, permanent, stand-alone facility that is designed to archival standards and that meets the functional requirements for archives storage and access. The facility must support archival best practices, develop operations and programs that preserve the records of Marblehead, and serve and involve the citizens of Marblehead. A shared archival facility provides the partners the best opportunity to address collections preservation and provide access to their records.

There are a number of critical steps that must be taken early in the planning process for this project to move forward and to be successful. The first steps are to establish the potential partners, terms of agreements, policies and procedures, the quantity of current and future records to be stored and serviced, potential sites, and how the facility will be funded and managed. Once these agreements are developed, organized planning can move forward.

Good communication is a key element in the success of this partnership. Early planning meetings are important for building a common vision for the facility and its operations. Finally, there must be a strong and equal commitment from all of the partners.

With this project, Marblehead shows their commitment to protecting the historical records of their Town. It is truly an exciting opportunity for Marblehead to build a permanent home for its archives.

Section 2: Project Overview

Marblehead has a long and rich history. Much of the record of the town's past can only be found in the Historical Commission's repository, in the records created and held by the Town Clerk and by other Town departments, and with other town organizations with historical collections. However, without adequate housing these records are at risk of deterioration and may be hard for researchers to find and to use.

The Marblehead Historical Commission and the Town of Marblehead have taken the first steps to determine the requirements and logistics to establish a shared archival facility to preserve and make accessible these invaluable resources. This project is supported by a donation made by Ross and Rita Terrien to establish a repository for the Town of Marblehead's historical documents and records.

Archival collections are permanent and irreplaceable and should be stored and accessed in buildings that provide them with the necessary care, security and storage that ensures their preservation and access. Without adequate housing these records are at risk of deterioration and may be difficult for researchers to find and use. Each of the potential partner archives in Marblehead are in facilities that do not have the appropriate spaces or systems to preserve and service the records of the Town. Storage spaces are limited or completely filled, processing and preservation spaces are missing or are too small, and access is often compromised. Current facilities make it difficult to preserve the Town's historical records and make them accessible to the Town's citizens.

The yearlong archival study has five overall goals that have been divided into five phases:

1. Organization Selection:
 - a. Identify the town agencies and Marblehead non-profit, religious and other organizations that are potential contributing organizations to a town-wide archival facility.
 - b. Assess the general requirements of each potential organization, including collections formats and size, access requirements, and staffing needs.
 - c. Compile and review information on cooperative archives facilities and programs applicable to Marblehead's requirements.
 - d. Draft Letters of Intent for those organizations selected to participate in the development of the town-wide archival facility.
2. Organizational Requirements:
 - a. Assess the specific requirements of each participating organization, including collections formats and sizes, access requirements, staffing needs, and special considerations.
3. Determine the programmatic requirements for a shared archival facility.
4. Evaluate potential sites for a future archival facility.
5. Prepare a Master Plan to create a town-wide archival facility.

In May 2017, Marblehead hired archival consultant Michele F. Pacifico to conduct the archival study. After background study, Michele made her first visit to Marblehead from July 9 to July 12, 2017.

On June 28, 2017, the Marblehead Board of Selectman appointed the following citizens to the Marblehead Archival Facility Advisory Committee:

- Rebecca Cutting Curran, Town Planner
- Bill Conly, Marblehead Historical Commission

- Don Doliber, Town Historian
- P. Chris Johnston, Chairman, Marblehead Historical Commission
- John McGinn, Town Administrator
- Robin Michaud, Town Clerk
- Pam Peterson, Marblehead Museum
- Kyle Wiley, Records Access Officer/Selectman's Office

On July 10, 2017, Michele met with representatives from the Town's organizations holding historical records and presented an overview of the project, the components and requirements of a shared archival facility, and discussed the potential partners. The presentation was held at Abbot Hall. In attendance were:

- Abbot Library – Patti Rogers, Director
- Finance Committee – Pat Franklin (also Marblehead Historical Commission)
- Fire Department – Chief Jason Gilliland
- Police Department. – Nick Economou
- Town Administrator – John McGinn
- Town Building Commissioner – Rich Baldacci
- Town Engineer – Charlie Quigley
- Town Clerk – assistant clerk Jillian Lewis
- Town Planner – Rebecca Curran Cutting
- Historical Commission – Chris Johnston, Bill Conly
- Marblehead Museum – Lauren McCormack, Curator of Collections
- Marblehead Arts Association – Patti Baker, Director and Betsy Hundahl, Assoc. Director
- Oko's – Earl Doliber, Harold Hansen, Rick Bartlett
- Old North Church – Rev. Dennis Calhoun, Lesli Mead, Gordon Lothrop
- St. Michael's Church – Ed Nilsson (also Historical Commission member)
- Temple Sinai – Jon Leamon, Jessie Lipson
- Marblehead Reporter – Chris Stevens, Editor

Chris Johnston, Chairman of the Marblehead Historical Commission, opened the meeting with a presentation defining the projects' scope and objectives. Two of Johnston's presentation slides are below:



The Project

- The Town of Marblehead wishes to create a town-wide archival facility
- Preserve artifacts, objects and archival materials related to Marblehead's history
- Single facility for multiple organizations
- Public-Private facility
 - Conceptually similar to Danvers' & other town-wide archival facilities (<http://www.danverslibrary.org/archive/>)

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Project Objectives

- Create an environmentally controlled archival facility
- Store historical town records, artifacts and objects
 - from the Historical Commission's holdings, as well as
 - other town functions such as the Town Clerk, Fire, Police, Engineer, Buildings, Library, and
 - other town organizations with historical archives and other objects related to the Town of Marblehead and its history
- Serve as a primary storage and research facility for archives and artifacts broadly related to the history of Marblehead.
- Define options for the archival facility, which collaborating organizations are included, along with their requirements.
- Define a Master Plan defining the steps and timing to create a town-wide archival facility.

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Over three days the consultant visited and reviewed the holdings of select town agencies and organizations. At this stage of the project, 14 Marblehead institutions were interviewed. The consultant, Michele Pacifico, and Chris Johnston of the Historical Commission met with representatives, reviewed the records and their storage areas, and took photographs. An additional 3 institutions were interviewed by Johnston and they provided details on their records by email. In total, there are potentially over 40

Town institutions that can be considered for inclusion in the project. Other Town departments and institutions will be reviewed on the consultant's next visit if they remain interested in the project.

The consultant met with and reviewed the records at the following organizations:

- Marblehead Historical Commission
- Marblehead Town Clerk
- Marblehead Finance Department
- Marblehead Fire Department
- Marblehead Police Department
- Marblehead Town Engineer
- Marblehead Building Commissioner
- Abbot Library
- Marblehead Museum
- Marblehead Arts Association
- Oko Veteran's Firemen's Association
- Old North Church
- Saint Michael's Church
- Temple Sinai

Other Town institutions that are either interested or could be considered for inclusion in a future archival facility are (organizations with a * were invited to the opening meeting but did not attend):

- Additional Town agencies could include:
 - Cemetery Department
 - Harbormaster Department
 - Municipal Light Department
 - Selectmen Department
 - School Department
 - Water and Sewer Department
- Marblehead Little Theater
- Marblehead Masonic Lodge (contacted by Johnston)
- Marblehead Reporter
- MHTV (reviewed by Johnston)
- Boston Yacht Club
- Corinthian Yacht Club (contacted by Johnston)
- Clifton Lutheran Church (reviewed by Johnston)
- Christian Science Church
- Grace Community Church *
- Saint Andrews Church *
- Saint Stephens Church *
- Star of the Sea RC Church *
- Temple Emanu-El *
- Unitarian Universalist Church *

On the last day of her visit, the consultant met with the Marblehead Archives Advisory Committee to discuss the project's mission, focus, schedule and preliminary findings.

This Phase I preliminary report includes an overview of the consultant's meetings with potential Marblehead contributing institutions, her preliminary findings on the historic collections to be considered for this project, an overview of what other towns have done with shared facilities, a draft Letter of Intent, and a discussion of the issues that must be considered in a public/private shared archival facility.

Section 3: Cooperation as an Archival Strategy

Sharing facilities is a growing trend in archives and other cultural organizations. As budgets shrink and administrators seek greater efficiency and a more effective return on their investment, shared staff and shared facilities are becoming more common.

Archival facilities are inherently expensive because of their specialized nature and the high costs for preservation environments, security, and storage equipment. Marblehead is wise to be considering a shared Archives to preserve and make accessible the Town's invaluable historical collections. With lower costs, a single shared facility offers energy efficiencies, an environmentally sustainable structure, cohesive access to the collections, and results in a transformative collaboration for the Town's archival institutions.

A shared archival facility should consolidate current collections in one location and anticipate the ongoing needs for space and support services. Archives require spaces with specialized building systems that provide the controlled and secure environments necessary for the long-term preservation and access of the collections. There are many benefits to developing a shared archival facility for Marblehead, including better preservation, access, security, and public programs. Efficiencies accomplished in one facility result in cost savings for the Town and its historical institutions, and in a better future for the records of Marblehead.

Benefits of a Shared Facility for Marblehead

A shared archival facility benefits the partners, the public, and the research community. The benefits can include:

Partners

- Ability to house the collections of Marblehead in appropriately sized and environmentally precise storage spaces.
- Ability to perform processing, preservation, and digital operations to preserve and access the Town's records under optimum conditions.
- Savings in site development, site servicing, and project administration costs.
- Greater operational and maintenance efficiencies for each partner institution.
- Improved security for the collections.
- Expanded and improved staff and volunteer processing and work spaces.
- Expanded and improved digitization facilities.
- Provisions for future expansion of the partner collections.

Public

- Dedicated spaces to educate and enhance the public's knowledge about Marblehead history.
- Collaborative public programs.
- Ability to host research and training programs.

Researchers

- Expanded and enhanced access, services, and programs for Marblehead's citizens and for researchers from around the country and the world.
- Central location to access Marblehead's historical records.

- Central access to staff members with in-depth knowledge of the collections and their relationship to Marblehead history.
- Improved research room facilities that offer reference materials, microfilm and copy equipment, and finding aids for multiple collections in one location.
- Access to Wi-Fi and to one or more on-site computer terminals.
- Coordinated online public access and outreach.

Cooperation among archival organizations and programs is a relatively recent phenomenon. Traditionally, archives are smaller in size and fewer in number compared to other cultural institutions such as libraries and museums. Archival collections contain unique and one-of-a-kind materials that inhibit archivists from developing common descriptive standards or physically sharing collections as libraries do through inter-library loan. Funding for archives facilities has been limited, and real or perceived boundaries in governance, staffing and funding has discouraged collaboration.

One of the earliest archival cooperative efforts was the initiation of Area Research Centers in Wisconsin. Developed during the 1960s, the state was divided into 14 regions headquartered in University Libraries and managed by the State Historical Society of Wisconsin. Each center was responsible for collecting state and local records, as well as private papers generated within their region, and promoting public education. This model was adopted by other Midwest states, including Ohio, Illinois, and Minnesota.

The development of the computer and the Internet had an enormous impact on archives and has been a catalyst toward greater cooperation. Nationally accepted descriptive standards and the adoption of cataloging descriptors were established to parallel the library community and ensure standardization for improved researcher access to collection information.

Digitization of collections and the delivery of collection material online have further encouraged cooperation among archival institutions. The ability to bring disparate collections together from multiple locations to a single website addressed concerns about collection preservation and the physical distance between collections. The resulting increase in the use of collections and researcher demand for online access has encouraged archives to move even faster in this direction.

The ability to commonly describe and digitize materials has encouraged a number of state and local efforts to combine collections online. For example, the Massachusetts Digital Commonwealth site *“provides access to photographs, manuscripts, books, audio recordings, and other materials of historical interest that have been digitized and made available by members of Digital Commonwealth, a statewide consortium of libraries, museums, archives, and historical societies from across Massachusetts.”* The records of Marblehead are not yet represented on this state-wide research website.

Another example of digital cooperation is in the Town of Lexington, Massachusetts, which has a shared portal called Lexingtonheritage.org. *“The Lexington Heritage Resources portal provides virtual access to a selection of records and information regarding Lexington’s history. These records come from the three main repositories in the town – the Town of Lexington Archives, the Cary Memorial Library, and the Lexington Historical Society Archives.”* The growth of such efforts has encouraged communication and cooperation within local archival communities and is inspiring additional collective efforts.

The growing need for space to preserve archival collections and make them accessible to researchers is a logical area for archives to develop cooperative efforts and leverage their resources. However, archives are often underfunded and many are not given high funding priority within their parent

organizations. Often smaller size, modest positions, and larger fiscal pressures within the organizational structure make it difficult to advocate for an investment in specialized facilities. Governmental archival institutions, such as town and city archives, often seek to build their storage spaces or share space with another government agencies, and do not have as strong a history of sharing with non-government organizations.

Creating a facility for archival collections from a variety of organizations that have their own sense of identity and institutional focus results in a process that quickly that meets a number of complicated issues: terms of agreements, custody and policies surrounding the storage and access of the records, the size and the sources of funding, finding an appropriate site, management of the facility, and operational policies. However, as the cooperative facilities and programs discussed in section 5 illustrate, this is a changing landscape and archival facility sharing has been particularly successful in the last two decades.

A shared archival facility should consolidate current collections in one location and anticipate the ongoing needs for space and support services. Archives require facilities with specialized building systems that provide controlled and secure environments necessary for the long-term preservation and access of the collections. There are many benefits to developing a shared archival facility for Marblehead, including better preservation, access, security, and public programs. Efficiencies accomplished in one facility result in cost savings for the Town and its historical institutions and in a better future for the records of Marblehead.

Section 4: Potential Partners/Potential Collections

General

As part of Phase I of the Marblehead Archives Project, Consultant Michele Pacifico and Chris Johnston of the Historical Commission began a preliminary evaluation of the current holdings of the potential archives partners. Interested partners were asked to provide an overview of their archival holdings and meet with the consultant.

Over three days Pacifico and Johnston visited and reviewed the holdings of 14 town agencies and private organizations, took photographs of storage areas and records, and began to estimate the types and quantities of archival records that could be included in a shared archives facility. Some institutions provided descriptions and estimates of their collections and others were reviewed with a site visit. The consultant met with and reviewed the records of the following organizations:

- Marblehead Historical Commission
- Marblehead Town Clerk
- Marblehead Finance Department
- Marblehead Fire Department
- Marblehead Police Department
- Marblehead Town Engineer
- Marblehead Building Commissioner
- Abbot Library
- Marblehead Museum
- Marblehead Arts Association
- Okos Veteran's Firemen's Association
- Old North Church
- Saint Michael's Church
- Temple Sinai

In addition, Johnston visited or spoke to a few other organizations and they provided summary information about their archival holdings by email:

- Marblehead TV
- Clifton Lutheran Church
- Philanthropic Lodge (Masons) – discussed with historian
- Corinthian Yacht Club

This section summarizes the findings to date about the potential partner's archival collections. Complete information about holdings will be determined later in the study after the project partners' participation has been confirmed. Photographs of the storage areas and records of the surveyed archives are available in full size format from Johnston and Pacifico.

Each partner institution holds a variety of archival records types, some which require special storage equipment and environmental conditions. Ideally records are stored in environmental conditions that match their media type. For example, black and white photographs will last longer in cooler conditions than is necessary for paper records, while color film can best be preserved in cold storage.

The potential collections include a wide range of materials:

- Textual records
- Volumes and Ledgers
- Books and pamphlets
- Oversized records (maps, architectural drawings, blueprints, etc.)
- Black and white photographic prints, slides, film, glass plate negatives
- Magnetic tapes, glass plates, DVDs, etc.
- Color photographic prints, slides, and film
- Digital/Electronic records
- Art and 3D Artifacts
- Furniture

Below are the estimates of the current collections that the consultants were able to determine through the descriptions and on-site visits. Most of the partner's records storage areas are too small and at capacity, or are in conditions not conducive for records preservation. Some have no room to take in additional records. Some archival records are stored offsite. Other archival records are still in Town department spaces or are unknown. A future report will begin to refine these estimates and provide more accurate estimates.

It must be noted that because of the current inadequacies of records storage, materials such as bound ledgers and volumes are not stored horizontally, drawings that should be stored flat are rolled, and there are records stored on the floor or other inappropriate areas. With appropriate sized shelving and cases, some of the materials will require more storage space than is currently allotted. In addition, many of the records have not yet been fully processed. Processed collections can grow in volume as records are flattened, refolded and re-boxed. A future report will account for this growth in the overall total collection estimate.

In addition, institutions measure their records differently. Some use cubic footage (CF), some use linear footage (LF), and some use a combination of CF, LF and item counts. For planning purposes and to obtain consistent estimates, the consultant will convert the linear footage to cubic footage at a later date. All estimated quantities are rounded up in this report.

1. Marblehead Historical Commission

The Marblehead Historical Commission (MHC) is a Town agency that maintains historical materials and a catalog of donated historical material relating to the Town, assists researchers, maintains museum facilities in Abbot Hall, assists with preservation planning for the Town's historic buildings and conducts preservation planning and related activities for the Town.

The records of the MHC are stored on various floors within Abbot Hall, the historic town hall. Records are stored in cabinets, bookcases, file cabinets, flat files, boxes and on shelves. Objects are stored on the floor and on shelves in basement store rooms. Some records are processed and stored in archival boxes. Other materials are unprocessed. There are no set environmental conditions.

Finding Aids: Its holdings are cataloged in Past Perfect. Information [can](#) be accessed on-line through the MHC website. Cataloging of MHC holdings is ongoing using volunteers.

Records dating from 1700's include:

- Documents regarding early Town institutions, Town administration, Town businesses, Town properties, war correspondence and information, etc.
- Historical photographs
- Historical postcards
- Newspapers and newspaper clippings

Record types include:

- Textual records
- Volumes and Ledgers
- Books and pamphlets
- Oversized records
- Photographs
- Objects

Size of Holdings: as of June 28, 2017, a spreadsheet provided by the MHC estimates:

- 630 LF of records
- 5 flat files
- numerous 3D objects, including signs, framed photos,

2. Marblehead Town Clerk

The elected Town Clerk has a variety of duties including serving as the recording officer, the registrar of vital statistics, the public records officer, the licensing officer and the chief election official. The job also entails storage of the town's historical records, which go back hundreds of years.

The Town's records are governed by the State's Public Records Law and the disposition of public records are guided by *The Municipal Records Retention Schedule*. By state law, records from prior to 1870 are required to be preserved. Permanent records are to be retained for the life of the Commonwealth, and must be maintained in an accessible form. Additionally, permanent municipal records must be retained within the municipality.

The Town records administered by the Town Clerk are stored within the Clerk's office and in "vaults" in the basement of Abbot Hall. Records are stored on shelves, in file cabinets, in boxes, in varied sized volumes/ledger books, and in old "court file metal boxes" historically used for tri-folded deeds and wills. Some records are "processed." Other materials are unprocessed. There are no set environmental conditions.

Finding Aids: Town Clerk has internal indexes and finding aids to the Town records. The finding aids are not available online to the public.

Records dating from the 1700's include:

- Subject files on the Poor House, Schools, etc.
- Audio recordings – Selectmen meetings
- Town reports
- Town Meeting minutes
- Town ledger and records in volumes
- Zoning records
- Census records

- Assessor records

Record types include:

- Textual records
- Volumes and Ledgers
- Audio recordings

Size of Holdings: TBD

3. Marblehead Finance Department

The Marblehead Finance Department is a Town agency that maintains the financial records of the Town.

The records of the Finance Department are stored in the Mary Alley Office Building. Historical records are stored in two locked rooms on shelves and in file cabinets. More current financial records dating from the 1970's to current are stored in the office. There are no set environmental conditions.

Finding Aids: No finding aids for the historical records.

Records dating from the late 1800's and early 1900's include:

- Tax Assessor books – dating from 1908
- Accounts Payable ledgers – dating from 1904
- Finance ledgers – dating from 1882
- Payroll records – from approx. 1927 (tri-folded)

Record types include:

- Textual records
- Tri-folded textual records
- Volumes and Ledgers

Size of Holdings: TBD

4. Marblehead Fire Department

The Marblehead Fire Department is a Town agency. The known records of the Fire Department are stored at Headquarters. Records are stored in a cabinet and on shelves. There are no set environmental conditions.

Finding Aids: None

Records dating from 1800's (to check) include:

- Log Books (54 dating from 1800's) – stored in a cabinet
- Incident reports (from 1930's)
- Town reports

Record types include:

- Textual records
- Volumes and Ledgers
- Tools

- 3D objects

Size of Holdings: approx. 40 LF

Other possible records:

- Charlie Maurais may have photographs, news clippings and early helmets/bucket.
- Don Doliber – wrote History of Fire Department
- Lynn Photographer – photos of Fire Department?
- Jim Kerry – badge collection
- Lee Creighton – may have Chief Creighton's memorabilia
- Gerry No.5 - Hand tub belongs to the town.

5. Marblehead Police Department

The Marblehead Police Department is a Town agency. The known records of the Police Department are stored at Headquarters. There was a flood in basement and many records got wet and moldy. Records are stored in filing cabinets and in boxes on top of cabinets and on the floor. There are no set environmental conditions.

Finding Aids: None

Records dating from 1960's in basement include:

- Investigation reports
- Police logs

Record types include:

- Textual records
- Volumes and Ledgers
- Photographs

Size of Holdings: TBD

Other Possible records:

- Gridiron Club
- Police Museum – some items may still be in Old Town House
- Don Doliber – wrote history of Police Department

6. Marblehead Town Engineer

The Marblehead Engineering Department is a Town agency. The records of the Town Engineer are stored in the Mary Alley Office Building. Records are stored in filing cabinets, cabinets, and flat files. Many of these files are still active records. There are no set environmental conditions.

Finding Aids: There are internal indexes and finding aids, including a set of files organized by Marblehead street name. Information is not available online to the public.

Records dating from 1800s:

- Records of Properties and Right of Way – from mid 1800's
- Assessor Maps- being scanned – from 1800's

- Files and plans of town projects – dating from 1900
- Board of Survey records – from 1940's (some deterioration)
- Reference files – such as Town reports

Record types include:

- Textual records
- Ledgers
- Index cards
- Maps, Plans and Drawings – stored flat and rolled in cabinets
- Aerial film

Size of Holdings: TBD

- 76 flat files
- 41 file drawers (approx. 82 CF)
- 6 cabinets of rolled drawings

7. Marblehead Building Inspection and Building Commissioner

The Marblehead Building Inspection Department is a Town agency. The known records of the Building Inspection Department are stored at the Mary Alley Office Building. Records are stored in files on mobile shelving, in filing cabinets, and rolled drawings are on shelves. Many of these records are still active. There are no set environmental conditions.

Finding Aids: The Plans are arranged by map and parcel number. Information is not available online to the public. There is an outdated numbering system for many of the drawings and plans that is not currently available.

Records dating from “turn of century” include:

- Plans Reading Room – from 1950's; arranged by map and parcel number; are in file folders on shelves
- House plans/renovation files – some from “turn of century.”
- Plans and Drawings of Commercial and Public Buildings – from 1950's
- School buildings

Record types include:

- Textual records
- Resident Directory
- Maps, Plans and Drawings – stored rolled
- Blueprints – in a flat file

Size of Holdings: TBD

8. Abbot Library

The Abbot Library is a Town agency, which houses the “Marblehead Room,” a collection of local history materials. It is a mix of circulating and non-circulating material. There are no set environmental conditions.

Finding Aids: All materials are in the Library Catalog.

Records include: (TBD date span)

- Printed materials about Marblehead and Essex County
- Books by Marblehead authors
- Vertical files – clipping file
- Yearbooks and genealogies
- Microfilm of *The Messenger* and the *Reporter*.

Record types include:

- Textual records
- Books
- DVD's
- Photographs (small amount)
- Microfilm

Size of Holdings: TBD

Other Possible Records:

- Peter Lynch – may have an almost complete collection of *Neptune*.

9. Marblehead Museum

The Marblehead Museum is a non-profit institution. It was formerly the Marblehead Historical Society. It holds both archival and museum collections and operates three museums.

Archival Records: Are stored in the museum office and offsite. There are no set environmental conditions.

Finding Aids: Records are catalogued in Past Perfect and some are available online to the public.

Records dating from the 1700's (to check) include:

- Records of the Marblehead Historical Society
- Unitarian Church records (photographs are scanned)
- Personal papers (Ex. Ashley Bowen journals)
- History books

Record types include:

- Textual records
- Ledgers
- Books
- Photographs and Photo Albums (over 20,000)
- Glass Plate Negatives
- Maps
- Newspapers

Size of Archives Holdings: TBD

- 26 shelving units – approx. 765 LF
- 2 – 5 drawer flat files overfilled

- 5 filing cabinets of glass plate negatives, slides, transparencies – approx. 50 CF
- 10 plastic bins of uncatalogued materials offsite – approx. 30 CF.
- Photos and albums – 30 LF
- Other

Museum Collections: Currently stored in the Lee Mansion are a sizeable quantity and wide variety of 3D objects, textiles, and furniture. Collections are stored on all floors of the house, including the attic and basement. There is also a 16'x10'x8' off site storage unit. The historic house has no fire protection and no set environmental conditions.

Finding Aids: Objects are catalogued in Past Perfect and some are available online to the public.

Object types include:

- Wood furniture
- Tools
- Swords
- Dolls
- Ceramics
- Textiles
- Trunks
- Rugs
- Newspapers
- Signs

Size of Museum Holdings: TBD

Comment: The Museum is very interested in the project but its vast holdings of 3D objects are a significant complicating issue because of the quantity, size and variety of objects. These objects potentially require different environmental conditions and oversized storage shelving and cabinets. As the project progresses, the Town must determine if the new archival facility will have the capacity to store some or all of the Museum's object and artifact collections.

10. Marblehead Arts Association

The Marblehead Arts Association, founded in 1922, is a non-profit that operates the historic Hooper Mansion that showcases local and regional art. Records are stored in the basement and in closets throughout the house. The records have not been processed or appraised. There are no set environmental conditions.

Finding Aids: 2 general lists of records by location in the house. (may be incomplete)

Records dating from the 1960's (to check) include:

- Non-active records from the 1950's – financial, administrative, Council
- Membership files and surveys
- Events
- Volunteer and Docent manuals

Record types include:

- Textual records
- Photographs
- Posters
- Art
- Artifacts such as pottery, historic wooden bowl
- Furniture, including a wooden bed

Size of Holdings:

- Paper records approx. 150 CF

Comment: The Art Association is interested in the archives project. Their holdings are not processed and some of their records may not be archival.

11. Okomakemesit Veteran's Firemen's Association

The Oko's is a volunteer non-profit association. They lease a town-owned historic building built around 1888. It houses the Oko hand-pump, fire equipment, and firefighting memorabilia. Records date from xxxx (TBD). There are no set environmental conditions.

Finding Aids: None

Record types include:

- Textual records in boxes under cabinets and cases
- Photographs and albums
- Ribbons
- Trophies
- Framed prints and photos
- Models

Size of Holdings: Records and photos only = approx. 40 CF

Comment: The Oko's are interested in the archives project. Their holdings are not processed and some of their records may not be archival.

12. Old North Church

A congregation of the United Church of Christ, the Old North Church was established in Marblehead in 1635. The Old North Church's oldest records are housed in Boston in the environmentally controlled archival facilities at the Congregational Library in Boston through a revocable Trust.

However, some records dating from the 1850's are housed in the church office in Marblehead. The records are catalogued. In addition, the church's most valuable artifacts (Silver – Paul Revere Bowl, Parson Barnard Bible) are housed in a vault at the bank, or in other location(s). There are no set environmental conditions.

Finding Aids: The records held at the Congregational Library are catalogued and information is available on the Congregational Library's website. The records stored in the office are also catalogued but the finding aid is not available online to the public.

Record types include:

- Textual records in filing cabinets, a cabinet and in boxes
- Other materials (to be checked)

Size of Holdings: approx. 71 CF + cabinet

Comment: The Old North Church is interested in the archives project for the records they currently hold in their office space. Information about the records held at the Congregational Library could easily be integrated into future descriptions and catalogs within the Town Archives. It appears that the Church also has the option to return the records to Marblehead.

13. Saint Michael's Church

Saint Michael's Episcopal Church dates from 1714 and is the oldest Episcopal Church in New England that is still standing on its original site. St. Michael's has an endowed archival facility, with archival environmental controls, on its property.

Finding Aids: The church records are catalogued.

Comment: While it supports the project, St. Michael's probably will not participate in the project.

14. Temple Sinai

Temple Sinai was established in 1954. Records date from the mid-1950's. There are no set environmental conditions.

Finding Aids: None

Record types include:

- Textual records in filing cabinets and in boxes
- Newsletters
- Photographs
- Slides
- Videos

Size of Holdings: approx. 35 CF

Comment: Temple Sinai is interested in the archives project. Their holdings are not presently processed but they have started to inventory and scan some of their records.

The following institutions were not visited by the consultant, but provided information about their holdings either to Johnston or by email.

1. Marblehead TV (Marblehead Community Access and Media, Inc. – MCAM)

Johnston met with the Executive director. The MHTV Archives Project has identified their historically significant videos but considers their holdings "active records" that until digitized, need to remain onsite.

Finding Aids: They also have begun developing a searchable database of 30 years of *Headliner – The News of Marblehead*. They also have lists of their holdings.

Comment: The Board of MCAM is interested and supports the archives project. Their records are “active” and at this time will not be considered for inclusion in the Town Archives. However, after a database is developed and the issues of digitization and storage are resolved, there is the possibility that the original media may be deposited in the Town Archives. Certainly, the Town Archives and its researchers will want to know about the MCAM’s holdings and access any media that is available on the internet.

2. Clifton Lutheran Church

Johnston met with Church representatives.

Finding Aids: Clifton Lutheran has organized its holdings and inventoried the records.

Record types include:

- Textual records
- Photographs
- Blueprints (6 rolls)
- Index cards (birth, death, wedding, confirmation, etc.)
- Bibles
- CD’s

Size of Holdings: approx. 60 CF

Comment: Clifton Lutheran Church is interested in the archives project. Their holdings are processed and inventoried. To be included the church *“would expect the facility to be secure, with appropriate temperature and relative humidity controls for paper, CD, film and other records formats.... Be open for research...a reasonable number of hours...and expect its materials would be available for viewing by visitors...with reasonable precautions against theft or mis-filing...”*

3. Corinthian Yacht Club

The Corinthian Yacht Club is in the process of organizing its collections following the publication of its history this year. They have set aside a room for a potential archival facility.

Finding Aids: In process

Record types include:

- Textual records
- Yearbooks
- Photographs
- Artifacts

Size of Holdings: approx. 50 LF

Comment: The Corinthian Yacht Club is interested in participating in the archives project. They are in the process of organizing their collections and are in the early stages of planning for the future of their collections.

Other Departments and Organizations – not reviewed to date

There are a number of other Town Departments and private organizations whose records have not been reviewed and could be considered for inclusion in a future archival facility. Those organizations marked with * have not responded to requests to meet with the consultant or Johnston.

They are:

- Additional Town agencies could include:
 - Cemetery Department
 - Harbormaster Department
 - Municipal Light Department
 - Selectmen Department
 - School Department
 - Water and Sewer Department
- Marblehead Little Theater
- Marblehead Masonic Lodge
- Marblehead Reporter
- Boston Yacht Club
- Eastern Yacht Club
- Christian Science Church
- Grace Community Church *
- Saint Andrews Church *
- Saint Stephens Church *
- Star of the Sea RC Church *
- Temple Emanu-El *
- Unitarian Universalist Church *

Section 5: Case Studies – Shared Archival Facilities

As part of the shared Marblehead archival facility study, the Historical Commission requested options and recommendations for the potential public-private partnership. The Town asked the project consultant to compile and review information on existing shared archival facilities that could serve as models for Marblehead. The consultant was familiar with a number of shared facilities from past facilities planning work. However, since most of those were much larger institutions, she sought out additional examples of town and city archival facilities more similar in scope to Marblehead.

Representatives from six Massachusetts town archival programs were interviewed by telephone and email for this project. The institutions were a mixture of public and private institutions. Some have shared facilities or programs, while others do not have any kind of partnerships. Below is a list of the institutions that were interviewed for this report.

- Boxford Historical Document Center
- Burlington Town Archives
- Danvers Archival Center
- Gloucester Archives
- Lincoln Town Archives
- Winchester Archival Center

During the telephone interview respondents were asked to discuss their unique arrangements and offer insights. Some of institutional representatives shared copies of agreements governing relationships or collections policies. Sample agreements and policies that respondents were willing to share are included in the Appendices.

The consultant also researched other Massachusetts town historical records in Barnstable, Beverly, Concord, Lexington, Plymouth and Sudbury and in some cases is still waiting to obtain more detailed information.

A useful resource for this project is *Cultural Heritage Collaborators: A Manual for Community Documentation* by Melissa Mannon. She offers strong arguments for collaboration to preserve town history. She also describes the collaborative archives projects in Danvers and Winchester.¹

To illustrate the variety of cooperative arrangements, this section describes different cooperative situations. These examples provide insights into programs and facilities that are single and multi-functional, as well as programs with partners from the private sector, the public sector and a mixture of public and private cooperation.

The decision to share a facility or a portion of a facility varied from partner to partner. In some cases, it was driven by a Town administrator or by an Historical Society board member. In other cases, there was a pre-existing relationship that brought the partners together, or a grant or endowment prompted cooperation.

As part of this early planning, the Marblehead Advisory Committee should review these model partnerships and their agreements, and in some cases, consider doing their own follow-up

¹ Mannon, Melissa. *Cultural Heritage Collaborators: A Manual for Community Documentation*. New Hampshire: ArchivesInfo Press. 2010.

conversations. In addition, a great deal could be learned by visiting other shared facilities to get a better understanding of the issues and challenges that must be addressed in a shared facility.

Danvers Archival Center, MA

The Danvers Archival Center was started in the early 1970's to encourage cooperation among all institutions holding historical records in Danvers. The Center was started with little formal documentation and more with the hope that with a proper facility and a supervising professional the records would follow. The Archival Center houses both town records and private collections.

The Danvers Archival Center is a department of the Peabody Institute Library, the town's public library. It was initially housed in the Danvers Historical Society Headquarters. In 1981, the Town appropriated funds for a renovation of the library that included a newly constructed archival facility. The Archival Center houses a reading room, a manuscript storage room, and a vault. It is secure, has climate controlled storage and a fire protection system. (Danvers is now working to upgrade its fire protection system from a sprinkler system to a clean agent.)

Richard Trask has been the Archivist since the Center was founded and was instrumental in its formation. The idea emerged from his 1970 research paper titled: *A Plan for the Development of Danvers History*.

He is a department head of the Library and is also an appointed Assistant Town Clerk in order to have custody of municipal records.

Agreements and General Policies:

- Deeds of Gift used for donations
- Does accept permanent deposit/physical custody of some organizational records.
- Records on permanent deposit may be borrowed back for exhibits or special reasons.
- Reproduction and Copyright – all depositors abide by the same policy.
- (I have made 2 requests for copies of Danvers' agreements and policies but have not yet received the documents.)

Collections Policy:

"The Danvers Archival Center is a repository for information relating to the history and development of the geographical area encompassing Salem Village and Danvers, Massachusetts. The Archival Center performs its mission by gathering and collection of flat, informational materials through gifts and purchases, and through permanent deposits in cases where the material is owned by functioning corporate organizations."

- Holds Town records, including Town Council, Fire and Police Departments.
- Keeps newspapers and microfilm – received a grant to microfilm newspapers and keeps originals stored off site.
- Collects materials relating to Witchcraft.
- Trask believes he has strict collection policy – does not take active records.
- Does not take "questionable" materials.
- Collects only "significant" Danvers family collections
- Does not collect genealogical records – sends researchers to the Peabody.
- Businesses in Danvers generally do not participate.

- Does not compete with Historical Society – most paper records go to Archives; Historical Society does not have a reading room.

Finding Aids: There is a description of the holdings on its website.

Funding:

- Archives has a budget as a Library Department.
- Archives Special Fund was established to accept monetary donations to acquire important manuscripts and books relating to the Center's collection areas. The Archives does not receive the interest – only the principle.
- Generates funds from certified copies and copies of images.
- Able to purchase some historic materials from Library Trustees' fund.

Staff:

- 1 paid Archivist – Richard Trask
- 1 paid Clerical – 6 hours a week (was cut from 8 hours a week)
- Volunteers – Trask finds it works best with one or two committed and trained volunteers

Lessons Learned:

- Trask believes it is important to only accession non-active records.
- It took some organizations years to participate. Have to patient and build up trust.
- After the Congregational Church put its records on permanent deposit, other followed their example.
- Even though some organizations offered solely physical custody to the Archives, as time progressed they saw the value and importance of keeping the records in a central repository. No organization has asked for the return of their records.
- Was critical for Trask to serve the Town in many capacities and continually advocate for its history and archives.

Many other town archives have looked at Danvers as a model for a Town Archives. Mannon cites Danvers as one her case studies in her book on community documentation. The 2017 annual report for Danvers cites some of the recent inquiries about their set up, policies and operations; Marblehead is included:

The City of Beverly Librarian and City Clerk visited with several others to discuss establishing an archive in one of their municipal buildings. I was also in contact with representatives of Marblehead town government concerning their establishing archival facilities. The pastor and members of the church board of the Maple Street Church also met with me to look through their deposit collections and for ideas on their upcoming church anniversary. The Archivist for the Town of Bedford also visited for a tour and to discuss policies and procedures I use here.



Danvers Archival Center Reading Room

Lincoln Town Archival Center, MA

From the website:

Mission Statement

The mission of the Lincoln Town Archives is to collect, preserve, and provide access to the history and culture of the town of Lincoln, Massachusetts. Collections include municipal records, manuscripts, books, photographs, audio-visual materials, and other ephemera documenting the history of Lincoln from 1746 to the present.

About the Archives

The Lincoln Town Archives is a unique partnership between the Lincoln Library and the Office of the Town Clerk, governed pursuant to a Memorandum of Understanding between the two entities and endorsed by Town Meeting in 2008. The collaboration has enabled an integration of the town's historic cultural, private and public documents into a single inventoried collection, housed at both Town Hall and the Library. Management responsibilities for the Town Archives are shared by Library Director, Barbara Myles, and Town Clerk, Susan F. Brooks. Archivist Marie Wasnock, on board since 2008, splits her time between the two sites.

There is Town Archives Advisory Council that advises the Archival Center. Below is information from their website:

The Town Archives Advisory Council (TAAC) brings designees of each of twelve local historic preservation entities together twice yearly to seek opportunities to collaborate and amplify their individual efforts, as well as to learn from one another, and build a network of professional peers.

Mission Statement

The Town Archives Advisory Council's principal purposes are as follows:

- 1. To consider and make policy recommendations concerning the acquisition, preservation, and access to the town's collection of archival materials.*
- 2. To make practical recommendations concerning the integration of both private and public records into a single collection housed in part at the Library and in part at Town Offices.*
- 3. To engage in public education efforts to raise awareness of the existence, extent and value of the town's various public and private historical assets.*
- 4. To provide opportunities for productive collaboration among its members and their institutions.*

After severe water damage to the Library's vault, the Clerk was asked to participate in a long-range planning study for the Library and its historical records. Seeing mutual benefits, as both were charged with information management, the Librarian and Town Clerk jointly pitched the idea of a Town Archives. In 2007, Town Clerk Susan Brooks and Librarian Barbara Miles produced a PowerPoint presentation titled *Archival Survival* that they used to advocate for the formation of the Town Archives. They continue to work closely together to advocate and support the Town Archives and its successes.

The formation of the Advisory Council made up of representatives from Town organizations of historical stewardship, residents who are "archives and preservation professions, and professionals from the wider State region provided valuable support for the project. It was formed before any policies were in place but it was important to gain the trust of organizations who might feel threatened. There were other professional archivists on the Council who helped develop the early policies.

There is a formal MOU between the Office of the Town Clerk and the Library Board of Trustees, but the daily administration of the Town Archives is shared by the Clerk and the Librarian. Brooks and Miles are listed as Co-Directors and meet every month. The Librarian is appointed as an Assistant Town Clerk, with no addition of salary. There was a roving archivist at the start but in 2008, Marie Wasnock was hired as the part-time Archivist. She works out of both the Town Hall and the Library. Marie assisted with developing additional policies and procedures, and has worked to process the collections and create finding aids. The Archivist is knowledgeable about the State's records laws, follows the State's records schedules and identifies critical Town records.

The town has renovated and expanded the vaults in both the Town Hall and in the Library.² As a joint facility, they have improved research and security, obtained funding for preservation projects, created finding aids, and have started a digital program to improve online access to the records.

² For more information about the Lincoln Town Archives see: <https://www.nedcc.org/newsletters/lincoln-town-archives>

Agreements and General Policies:

- Both Brooks and Miles felt strongly that the Memorandum of Understanding be simple and straightforward.
- See Appendix D for Lincoln's Memorandum of Understanding.
- See Appendix B for policies on Use of Materials and Reproductions.

Collections Policy:

- Lincoln's collection policy is clear about what records it will consider for inclusion in the archives.
- Lincoln's Gifts Policy requires that all rights to donated collections are turned over to the Archives. It does not allow for permanent deposit or physical custody.
- See Appendix B for the Collections and Deaccessioning policies and the Deed of Gift.

Finding Aids:

- There are finding aids to the collections that are available online and in paper copies in the Archives.
- In addition, Town Archives is in the process of adding searchable local historical items to the [Internet Archive](#) and [Digital Commonwealth](#).

Funding:

- Early years - was a line item in the budget.
- MOU – semi-annual meeting between the Clerk's office and the Library Trustees to set the budget. Now has its own department budget.
- Received grants for an assessment and roving archivist early in the project.
- Used Community Preservation Act and its surtax model to raise funds for its joint archives project.

Staff:

- 1 paid part-time Archivist
- Co-Directors: Town Clerk and Librarian

Lessons Learned:

- "Key to success – all participants were witness and had a voice."
- Formation of Advisory Council of locals and professionals was critical to success and continues to provide a network and an opportunity to coordinate programs on local history– meets 2 times/annually.
- Important to continually advocate for the Archives and communicate the importance of proper care of the Town's historical records.
- Important to collaborate with the Historical Society and all other town organizations.
- Has a strict collection policy – Donors cannot have "free access" to records, especially since public funds are being used for preservation and processing. The Archives is willing to loan materials for specific purposes and for specific periods of time. (This policy has kept some Town organizations from donating their records.)
- Volunteers must abide by the processing policies of the Archivist.



The Town Offices vault houses municipal records such as the 1921 General Register of Voters – Women Only, a World War Two ration book, and a letter from President John F. Kennedy concerning the establishment of Minute Man National Historical Park.

Lincoln Town Archives, Lincoln, MA



The Library vault before renovation.



The Lincoln Public Library vault after renovation and installation of compact shelving.



Winchester Archival Center, MA

The Winchester Archival Center opened in 1975. It is a collaboration of the Winchester Historical Society, the Winchester Public Library, and the Winchester Town government. It is a department of the Town.

The Archival Center does not hold the official records of the Town – they remain under the care of the Town Clerk. However, it does take in select deaccessioned records of the Town Clerk. Other town departments such as the Building Department keep their own records. In addition, art and artifacts are held by the Winchester Historical Society. There is an Archives Advisory Committee consisting of three people.

There was discussion of creating a climate controlled, secure facility for the Town and Historical Society records in an historic structure, but the costs were too high. The records are currently stored in a vault in the Town Hall.

Its mission from its website:

Mission

Collect and preserve materials that document all aspects of Winchester history and the lives of its residents

Assist research into Winchester history by facilitating public access to the information contained within the collections

Provide historical information to other municipal departments and town officials

Collaborate with the public library, Town Clerk, Historical Society, and Historical Commission in promoting community awareness and participation in documenting local history.

Agreements and General Policies:

- Donors must abide by reproduction and copyright provisions.
- Local organizations are able to add the capability to check out documents in the future by using the “restrictions” line on the Deed of Gift.
- See Appendix C for Winchester’s Deed of Gift and Reproduction forms.

Collections Policy:

“Our collections are the result of generous donations from individuals, organizations, and businesses. Gifts relating to local history are gladly received, as are electronic copies of scanned photos or documents.”

- Photographs go to the Archives.
- Objects go to the Historical Society.
- See Appendix C for Winchester’s Collections Policy.

Finding Aids:

- The Winchester Archival Center has an online catalog using Past Perfect.
- Some collections are described at the item level while others have a general description.

Funding:

- Originally salary was split between the Historical Society and the Town.
- Is now funded by the Town and the Archivist reports to the Assistant Town Manager.
- Has a revolving fund from monies earned through reproductions and the sale of publications.
 Uses money earned to buy historical items from eBay or similar sites.
- Has considered charging for genealogical research.
- Received grant money to purchase the Past Perfect software.

Below are summaries of the other grants received for the Winchester historical records programs.

2003: Massachusetts Historic Records Advisory Board. \$5000

- *To the Town of Winchester for a survey of the archival collections in Town Hall, Sanborn House, and Library; also training for volunteers and staff in how to organize and catalog archives.*

2005: Commonwealth of Massachusetts, Massachusetts Historical Commission, Preservation Planning Grant (MHRAB). \$15,000, matched by \$15,000 from the Town of Winchester and \$15,000 from the Winchester Historical Society

- *To the Town of Winchester for a Feasibility Study for the Reuse of the Sanborn House and Grounds. [was to consider adapting the historic building for use by the Historical Society].*

2005: National Endowment for the Humanities Preservation Assistance Grant. \$6,000

- *To the Town of Winchester to conduct preservation needs assessment of collections in the Archival Center, Town Hall, Library, and Sanborn House. [This also provided a consultant and for a draft manual to be prepared by the Archivist.]*

-
- 2009: *Enka Society. \$5,000*
 - *To train Winchester organizations in archival preservation and management.*

2011: *National Endowment for the Humanities, Sustaining Cultural Heritage Collections Planning Grant, \$35,000*

- *In collaboration with the Town of Winchester*
- *To develop plans for archival storage and a history study center in the basement of the Sanborn House, using new technologies for sustainable architecture and applying new standards for storage of heritage collections.*
- *[The 2011 NEH grant deals specifically with the feasibility of putting a Town Archives, meeting state requirements for permanent local records, in the basement of the Sanborn House. The conclusion was that it would be prohibitively expensive. It does provide information about guidelines to state requirements for public access.*

Staff:

- 1 paid part-time Archivist (12 hours/week)

Lessons Learned:

- Online catalog helps with the advocacy for the Archives.
- Grant money to train volunteers in archival standards and techniques was helpful in processing and in allowing more citizens to learn the importance of archives.
- Possibility that when Archivist retires the Town Clerk will take over administration of the Archives.
- Archivist spends too much time helping with genealogy and has consider charging a fee for lengthy research tasks.

Boxford Historical Document Center

The Boxford Historical Document Center in Boxford, Massachusetts opened in 1976 as part of the Town's celebration of the Bicentennial to preserve the Town's records and historical documents. It is funded by the Catherine Ingalls endowment and holds private collections. The Center does not hold official Town records, although it has copies of Town reports and some deaccessioned Town records.

The Center holds the records of two Congregational churches, personal papers of Selectmen and Town committee members, and records of many private organizations and clubs. The church records were deposited with a deed of gift. The organizations have been more informal and are on deposit, although the Archivist doubts they would ever withdraw them. "In reality, the archives is doing them a favor" and the records are in a controlled environment (68° F/40% RH).

Finding Aids:

- There are Guides to the collections that are available in the Archives.

Funding:

- Endowment

Staff:

- 1 paid part-time Archivist

Lessons Learned:

- Endowment may not be enough to sustain the collections into the future.
- Aging Board of Directors – should the Center combine with the Historical Society?
- Early on expressed interest in combining with Town Clerk, but the Clerk was not interested.

Gloucester Archives, MA

The Gloucester Archives is the repository of the town and city municipal Records and have been maintained by a volunteer Archives Committee. There is no distinction between historic town records and current records. The records are housed in a small room in the basement of City Hall.

Gloucester also has a local history collection housed at the Sawyer Free Library. Recently an archivist was hired to split her time between the two archival collections. There have been discussions about merging the two collections and obtaining a shared facility but there has been no real planning.

Lexington Archives, MA

The Town of Lexington currently does not have a shared archives facility, although a new “Archives Center” for the Historical Society has been planned and the exterior design has been developed. Below is the email that I received from the Archivist at the Lexington Historical Society.

“As far as the new archival building, we are in a bit of a holding pattern due to legal concerns, so we aren't totally sure what the timeline on that facility will look like. I can also tell you that in Lexington we have archives at the Historical Society with us, we have a town archivist, and we have some archival materials in the town library. We all overlap a bit, but all kind of have our own niche.”

Lexington has a large historical society and currently stores its records in a climate controlled storage area in the basement of a historical house. The storage area is almost full. The proposed new facility will be an addition to the historic tavern and will include climate controlled storage on 2 floors, a volunteer/intern processing room and a public research space on the first floor. The proposed building will house “non-governmental historic records.”

Meanwhile, the Town of Lexington is sharing its records information digitally with a shared portal called Lexingtonheritage.org that is sponsored by the Town. *“The Lexington Heritage Resources portal provides virtual access to a selection of records and information regarding Lexington’s history. These records come from the three main repositories in the town – the Town of Lexington Archives, the Cary Memorial Library, and the Lexington Historical Society Archives.”*

Lessons Learned:

- Historical Society’s Deed of Gift provides the Society with ownership of all donations.
- The Deed of Gift provides a clause to scan the originals and keep the copyright, with the originals being returned to the owner. (example is WWII family photos)

Other Massachusetts Town Historical Records

- *“The Sudbury Archives Project began in November, 1991 as an effort to create a thorough index and database of the large collection of pre-1850 documents within the town of Sudbury, Massachusetts. The database includes the extensive records of the Town Clerk's Office in Sudbury, unique for its unbroken series of Town Meeting Records from 1639 to the present day, in addition to documents from the archival collections of the Goodnow Library, Longfellow's Wayside Inn, the Sudbury Historical Society, and the Wayland Historical Society. Currently, the database includes approximately 15,000 records dating from 1639 to 1850. Each record is searchable by title, date, subject, personal name, location of original, document category and record number, and many include editorial or historical annotations. Many records also contain scanned images or transcriptions of the original documents.”* (need to find out where the records are stored).
- Towns such as Concord and Yarmouth have “Archives Centers” on their website, which allow digital access to some of the towns’ municipal records, although they tend to be more recent records.
- The Town of Burlington Archives is solely the repository for municipal records.
- The Plymouth Town Hall is being renovated and will include new vaults with climate control and mobile shelving for the town records. Plymouth used Community Preservation money to pay for a portion of the town hall project.

Section 6: Characteristics of Shared Facilities

Leadership and Vision

Shared facilities require enlightened leadership and a shared vision. Building partnerships occur for a variety of reasons. They can be benefactor's vision, come from common needs, or result from close working relationships where one partner can offer space in return for expanded collections that support a common mission. To be successful, leadership and a common vision are essential.

Mannon makes the argument in her book on Community archives that to be a successful collaborative "one individual must take responsibility to be the driving force toward initial development."³ The successful case studies discussed in Section 5 were initiated and developed by a few dedicated individuals who were good communicators and who responded to the concerns of the different potential partners.

Joint projects take effort, good communication and well-defined goals. The potential partners in Marblehead should begin to examine how a joint facility will affect their mission, collections, and audiences. Agreement and acceptance of a common vision will assist each of the partners to gain support from the town leaders, parent organizations, boards, staff, friends, and the public.

A project of this size and duration requires commitment at all levels. There will be additional work, new responsibilities and stress. While it is a wonderful outcome when the facility is completed, it can be a long process and strong and united leadership group is essential. Marblehead has already anticipated this need by establishing the Archival Facility Advisory Committee. A cohesive steering committee of the Town leaders and administrators can determine the project's scope and parameters and communicate vision, establish funding strategies, and determine the best ways to garner political and public support.

Common Needs

Archival building partnerships generally grow out of common needs. With an appropriate facility and staff, archives can gain improved storage conditions, expanded collection use, future expansion space, and access to a wider range of services such as digitization, conservation, exhibits, and public programs. Partnerships seek tangible benefits, shared resources, collaborative programs, and synergies to enhance shared and individual programs. A shared building offers the partners one project with many benefits and cost savings.

In Marblehead, there is a clear need for expanded and improved storage and better access to the Town's archival collections. With complimentary collections and a common location, a shared facility could benefit and enhance all the institutions. Whether its mission is a building to improve storage and access, to create a comprehensive Marblehead Archival Center, or a hybrid facility that falls in-between, the partners can maintain their individual institutional identities while improving common needs.

³ Mannon, p. 50

Communication

While the common needs are evident, the partners have diverse backgrounds and experiences. Potential partners include Town government agencies, private non-profits organizations, and churches and synagogues. Their structural differences and the resulting experiences and viewpoints will play a role in building a cohesive group tasked with planning and executing the design and operation of a shared facility. Creating a new facility requires many decisions, and getting input and resolution from different constituencies adds time and complexity to the process. Structured management and organized communication are essential to a well-managed building project.

To be successful, the partners need to focus on communication, planning, and their joint mission. Initial meetings should begin to formulate a common vision and identify critical areas of agreement and disagreement. Letters of Intent should be signed by all Town institutions that are interested in moving forward with the archives project.

Partner communication should be encouraged at all levels and should begin long before the facility is planned, built and occupied. As the project progresses, the partners should hold regular meetings and share decisions and news on a regular basis. In-person meetings build support and encourage camaraderie. However, regular electronic communication is easy and also valuable. Bulletins, newsletters, and minutes of meetings relay information immediately to all participants and avoid rumors and misinformation.

The most important lesson learned from the consultant's interviews with other shared archival facility staff was the value and importance of communication and early planning. Collaboration, respect and commitment should take place at all organizational levels and must be modeled by the project leaders.

Section 7: Agreements

The survey of shared archival facilities uncovered a variety of agreements. They generally reflected the relationship of the partners and the types of records. The Marblehead partners need to establish critical agreements in their early planning stages. Letters of Intent, Memorandums of Understanding, and any other needed Agreements should be developed for the archival facility's management, operations, collections, and research policies. See Appendices D and E for copies of sample agreements.

Partnership/Letter of Intent

The first decision will be to determine those partners that are ready commit to pursuing and participating in a shared facility for Marblehead's archival records. The partnerships should be defined and resolved before moving forward with detailed requirements, cost estimates, site selection, and design/construction. As the first step in Marblehead's Archival study, Letters of Intent (LOI) should be drafted and signed. Those partners interested in moving forward with the project will sign the Letters. Below is a sample LOI for this project. A copy also appears in Appendix A.

Draft Letter of Intent – Marblehead Archival Facility Project

Date:

To: Organization Name

Subject: Marblehead Archival Facility – Letter of Intent

Dear xxxx:

Marblehead has a long and rich history. Much of the record of the town's past can only be found in the Historical Commission's repository, in the records held by the Town Clerk and by other Town departments, and in other Marblehead organizations with historical collections. However, without adequate housing those records are at risk of deterioration and may be hard for researchers to find and to use.

Archival collections are permanent and irreplaceable and should be stored and accessed in facilities that provide them with the necessary care, security and storage that ensures their preservation and access. Each of the potential partner archives institutions in Marblehead are in facilities that do not have the appropriate spaces or systems to preserve and service their records. Storage spaces are limited or completely filled, processing and preservation spaces are missing or are too small, and access is often compromised. Current facilities make it difficult to preserve the Town's historical records and make them accessible to the Town's citizens.

The Marblehead Historical Commission and the Town of Marblehead have taken the first steps to determine the requirements and logistics to establish a shared Town archival facility to preserve and make accessible these invaluable resources. Funded by a donation made by Ross and Rita Terrien to establish a repository for the Town of Marblehead's historical documents and records, the yearlong archival study has five overall goals that have been divided into five phases:

1. Determine the partners - organization selection.

2. Determine the organizational requirements for a share facility.
3. Determine the programmatic requirements for a shared archival facility.
4. Evaluate potential sites for a future archival facility.
5. Prepare a Master Plan to create a town-wide archival facility.

There are many benefits to developing a shared archival facility for Marblehead, including better preservation, access, security, and public programs. Efficiencies accomplished in one facility result in cost savings for the Town and its historical institutions and in a better future for the records of Marblehead.

The Marblehead Historical Commission and the Town of Marblehead commits our support to the development of a Town Archival facility and acknowledges our shared interest in the multi- phase project. We agree to work together with [organization name] to develop the project.

[Organization] agrees to participate in the archival study and the development of shared archives. By agreeing, the [Organization] will participate in meetings and presentations on the project and provide information and data about its records to the project consultant and the Chairman of the Marblehead Historical Commission.

A future governance structure and defined policy and procedures will be evaluated and pursued as the project evolves. [Organization] acknowledges this important benefit, along with the many other project benefits described in this letter. [Organization] is committed to advancing the Marblehead Archives project, realizing its benefits, and actively engage in the development of the project.

[Organization Name]
[Signing Authority]

Town of Marblehead
[Chairman, Board of Selectman]

[Date]

[Date]

Building Name and Partner Recognition

The gift from the Ross and Rita Terrien estate stipulated that the archives facility “created shall be in the name of Ross and Rita Terrien.” Further agreements must be developed to determine how all partners will be recognized in the signage, publications, websites, and publicity.

Building Ownership, Funding and Administration

Critical issues for cooperative facilities are funding, ownership and administration. Partners must agree on a funding structure for the design, construction and operation of the building. Archival facilities are special facilities that have fire protection, mechanical and security systems and may require special floor loads.

One common option is for a single organization to be the “owner” that builds the facility and invites partners to share the space and either pay rent or make in kind contributions. Town appropriations, special tax or bond efforts, and donations are all funding methods to consider for a Town Archives.

Sometimes there is a bequest or endowment to assist with expenses. In December 2014, the estate of Ross and Rita Terrien made a gift to the Town of Marblehead to “create a repository for the Town of Marblehead historical documents and records.” This gift also stipulated that “the management of the facility is to be under the control of the Town of Marblehead Historic Commission.” These details need to be developed.

Depending on its set up, it may be important for the partners to determine how each partner contributes to the central decision-making. Facility oversight could come in the form of a “Partner Board” or an expansion or change to the current Archives Advisory Committee. Other successful shared facilities make their facility management decisions by board votes or committee consensus.

It is essential for the Town Archives to hire at least one professional archivist. A project of this size and scope should have an autonomous professional archivist to manage the day-to-day operations of the facility, oversee policies, procedures and collection development, and coordinate reference, processing, outreach, and volunteers. If Town Clerk records are included, the Town may consider deputizing the Archivist as was done in Danvers and Lincoln.

Building Administration and Operations

Building administration and operations, including facility management, security, maintenance, and disaster planning should be addressed early in the process. They can be addressed in a number of ways. Building ownership could determine the oversight and responsibility of the facility. Partner representatives or a contract manager are options used by other cooperative facilities. Funding options or the budget may steer the partners toward one type of management model. Regardless of the choice, it will assist the design effort to know how the facility will be cared for and managed.

Other Funding Sources

The Marblehead partnership should investigate foundation and government grants for planning and functional needs. Funding agencies often favor collaborative projects with multiple partners. Broad support, and decisive plans and agreements that are made early in the process, are important if the Town wishes to pursue grants by next year.

Federal funding:

- The National Endowment for the Humanities provides funding for planning and installing equipment that improves the preservation of archival and library collections. Funded equipment can include shelving and heating and air conditioning equipment. Maximum planning grants are up to \$40,000 and implementation grants are \$400,000. (<http://www.neh.gov/grants/preservation/sustaining-cultural-heritage-collections>).

The State of Massachusetts has funding and grant programs:

- Massachusetts Digital Commonwealth program – If your institution is a member, the Boston Public Library will digitize a selection of your records (about 5,000 sheets/year). Boston Library

will pick them up or you can drop off. The Gloucester Archives has used this free service to digitize some of their records.

- Massachusetts State Historic Records Advisory Board (Massachusetts SHRAB) - The Massachusetts SHRAB is the state-level review body for grant proposals submitted to the National Historical Publications and Records Commission (NHRPC). The Massachusetts SHRAB is available to provide guidance in determining appropriate grant project proposals as well as review of grant drafts. While the primary focus is on the NHRPC grants, the Massachusetts SHRAB is also available to assist with private grants or grants from other governmental agencies. Grants are available to help with a variety of historical records project

-- Example: City of Newton, Newton, MA received \$20,237 to preserve and make accessible to the public three centuries of municipal records in the Newton City Archives.

-- The Roving Archivist Program was developed by the Massachusetts State Historical Records Advisory Board (MA SHRAB) as part of its mission to provide leadership, advocacy, and guidance to help ensure the identification, preservation, and use of the Commonwealth's historical resources, both public and private. The Roving Archivist Program connects stewards of historical records with a professional archivist to assist in setting priorities, drafting policies, and developing strategies and procedures for processing, preserving, and cataloging collections for their institution. Any cultural heritage repository may apply; preference will be given to repositories that do not have a professional archivist and have limited resources.

- Community Preservation Act - *"CPA allows communities to create a **local Community Preservation Fund** for open space protection, historic preservation, affordable housing and outdoor recreation. Community preservation monies are raised locally through the imposition of a surcharge of not more than 3% of the tax levy against real property, and municipalities must adopt CPA by ballot referendum. To date, 172 municipalities in the state have adopted CPA. The CPA statute also creates a statewide Community Preservation Trust Fund, administered by the Department of Revenue (DOR), which provides distributions each year to communities that have adopted CPA. These annual disbursements serve as an incentive for communities to pass CPA."*
 - Plymouth used Community Preservation Act money and "Green Community" grant money to pay for a portion of its town hall renovation project, which includes an archival storage vault.
 - Lincoln used the Community Preservation Act and its surtax model to raise funds for its joint archives project

Private foundations and other granting agencies might also offer support for archival facility projects. For example, the Andrew W. Mellon Foundation supported the cooperative building planning for the shared archives and library storage facility for Princeton, Columbia, and the New York Public Library.

The Internet Archives will digitize bound volumes and other archival records for free if you allow them to post them on the internet.

- *"Internet Archive has regional digitization centers in 32 locations and 8 countries. Our teams digitize over 1500 eBooks per day. We also have the capability to digitize archival items, bound and single sheet items, thesis, periodicals, microform and other items with our non-destructive, color process. We have worked with over a thousand library partners who have allowed their content to be digitized."*

Other possible funding opportunities could aid in developing a common website/collection search engine, for collections assessments and preservation efforts, or for move preparation efforts. Specific fundraisers could be held within the Marblehead community. Marblehead businesses that are interested in naming opportunities or a sponsored exhibit could provide funding for preservation projects or exhibits. Businesses and other public entities favor this kind of corporate outreach and might support construction of new galleries or its cases and equipment.

Future Agreements

There is a list of issues that must be considered before entering into final agreements or Memorandums of Understanding (MOU). Collection ownership and custody are critical matters, which can have a significant impact on operations. Reference, reproduction, copyright, and future gift policies also need to be discussed and codified. Sections 8 addresses the many issues and questions that must be tackled as this project moves forward.

Section 8: Issues and Questions

Building any new facility challenges operations, procedures and assumptions and requires rethinking the way institutions work. The prospects of sharing a facility raise many issues and questions that the Marblehead Partners need to evaluate, discuss and resolve. Policies, procedures, rules and unwritten rules will suddenly be open to questions and debate. However, with good communication and a sense of humor, the outcome will be new ideas and consensus for improvements and solutions that result in a successful partnership and shared facility.

As the archives project progresses, the Archival Advisory Committee, with assistance from the consultant, should begin to draft the common policies and procedures that will guide the facilities design and operation. The Committee should discuss and recommend joint operational and functional decisions and ensure that the many requirements are addressed and resolved. The committee can start these discussions by sharing current written policies and procedures pertaining to Marblehead historical records and review those in other Massachusetts town archives. Often a peer institutions will have an operational procedure or a ready solution that works for all the partners.

After discussion with the partners, final policies and procedures should be codified in a Memorandum of Understanding and signed by all partners.

This section will help the partners to look ahead to the many questions that require discussion and decisions

General Policy and Procedures

One of the most central issues to be determined are the overall terms of partnership in the Town Archives. For a successful Town Archives, the appropriate terms of understanding that will accomplish the mission of the Town Archives are listed below.

- What is the Collection Development policy? What will be the scope of the collection?
- How do you plan for growth? For late-coming organizations?
- What are the terms for accessioning records? Deed of Gift? Permanent Deposit? Physical Custody?
- How will the Archives handle physical custody terms?
- What are the loan provisions? For partner organizations? For exhibits?
- What is the access policy for partner organizations?
- How do policies relate to the use of public funds for preservation?
- What is the deaccession policy?
- What are the staffing requirements?
- Volunteer policy?

Internal Spaces

Collection Storage

Archival storage is the largest part of the facility and its requirements should be determined early in the planning process.

- Will all collections be kept separate and discrete? Will there be any intermixing?
- Will storage be available for the museum's objects? What about other institutions' objects?
- What are the desired security systems and procedures?
- Who has access to the storage areas?
- How will collection storage equipment be numbered?
 - Single numbering system (range and shelf number) for all of the storage equipment in the building.
 - Partners decide on the type of numbering system for their shelving areas.
- Will a building-wide location register system using bar coding or radio frequency identification (RFID) be introduced to track storage locations and item movements?
 - Will this information be available online to all partners?
- Who will be responsible for monitoring collection storage conditions?
- Who will be responsible for contacting facilities management staff about abnormal conditions?

Records Processing

How will processing of records be addressed?

- Will there be one uniform method of processing?
- Will uniform supplies be used in all future processing?

Collection Preservation

One of the primary roles of an archives facility is the protection and preservation of its collections.

- Who will assume the management of preservation issues?
- Will there be a conservation committee made up of partner members?
- How will preservation tasks be prioritized?

Digitization

- Will there be a digitization committee made up of representatives to coordinate digital policy and programs?
- What issues need to be considered?
 - Coordinate digital planning and develop a cohesive digital strategy that meets the needs and demands of online researchers.
 - Establish digitizing standards so that projects are coordinated and delivery and preservation are similar for all partner projects.

Collection Inventories/Cataloging

Current collection descriptions reflect each partner's history and their varying description policies. Descriptive systems include card indexes, printed finding aids, online finding aids and catalogs. Each partner's finding aids will move to the new building and continue to be used by staff and researchers.

With the advent of the new facility, researchers will expect to go to a single source to find information about the partner's collections. Developing a new system will be time-consuming and should begin well before the building opens.



<http://www.historyresearch.utah.gov/>

- Will there be a single, dedicated public online access system that allows researchers to search all partner collections simultaneously?
- How will decisions be made about developing access systems for the new building?
- Characteristics of Collections Access System?
 - Will the software be selected from a system currently used by one of the partners or an entirely new system? (Ex. Past Perfect)
 - Will the system be robust enough to provide access to collection level descriptions, finding aids, and digital resources?
 - Will the system have the capability of managing accessioning data, circulation data, user information, and collection locations?

Public Spaces and Services

Reference Services

Most of the potential partners currently provide telephone, in-person and/or online reference services. While there are certain agreed-upon processes and procedures when offering reference services, there are differences that need to be resolved prior final agreement.

Assuming that a professional archivist will be hired to direct reference and processing of the collections:

- Will there be a single set of Research Center rules or different rules depending on the material being used?
 - Are there legal statutes or rules that affect the Town's records that are not applicable to other partners?
 - How will the rules be established and agreed upon?
- How will reference questions arriving by mail, telephone or electronically be prioritized and answered?
- What will be the standard Research Center hours?
 - Will there be weekend hours?
- What are the security procedures?
- Will self-copying be allowed?
 - Will the facility provide a publicly accessible copier/scanner?
 - Can researchers make copies using personal devices?

- Personal phone
 - Camera
 - Hand-held or regular scanner
- What are the copying charges?
 - What is the copying money used for?
 - Who does the accounting?
- What are the copyright issues?

Online services

Some of the partners currently maintains a separate website that delivers collection information and/or digital content. With the opening of a new facility, researchers and visitors will seek information about collections, hours, researcher guidelines, and events. The partners need to address how they will move forward in communicating online information about services and their collections.

- Will there be a single web page for the shared facility describing public services: collections, access, use, and collection searches?
 - Will each partner offer their own website in addition to a main building website?
- If there is a joint website, who will develop and maintain it?
- Where will online sources reside – joint server or single shared server?
- Will there be an on-line access/cataloging system providing access to all collections from a single search engine?
- Will there be a single set of digital resources created from partner collections?

Exhibits

Exhibits that tell the story of Marblehead have the potential to bring wider support for a new archival facility, as well as make the facility a destination for families and student groups. Several of the potential partners already have exhibit spaces and programs. Online exhibits are becoming increasingly popular.

- How will future exhibits be organized and planned?
 - By a partner committee?
 - One or two partners take a leading responsibility?
- What coordination is necessary to incorporate materials from the varied partner collections?
- What is the policy for lending materials from the Archives to organizations with materials on permanent deposit? an outside organization.
- What is the policy for lending materials from the Archives to outside organizations?

Section 9: Next Steps

All of the Marblehead archival institutions participating in this project require an appropriate, permanent, stand-alone facility that is designed to archival standards and that meets the functional requirements for archives storage and access. The facility must support archival best practices, develop operations and programs that preserve the records of Marblehead, and serve and involve the citizens of Marblehead. A shared archival facility provides the partners the best opportunity to address collections preservation and provide access to their records.

There are a number of critical steps that must be taken for this project to move forward and to be successful. The first step is to establish with certainty the building partners, the quantity of current and future records to be stored and services, potential sites, and how the facility will be funded and managed. Once these agreements are made, organized planning can move forward.

Listed below are the next steps of the planning process.

Partner Letter of Intent:

Finalize the list of partners who are interested in participating in a Marblehead shared archival facility. Obtain signed Letters of Intent from those partners who want to be included in the next steps of the Marblehead archival project.

Archives Visits:

Advisory Committee members should visit comparable sized shared town archival facilities to review best practices and the design and operational options for a shared facility.

Establish Critical Agreements

The Advisory Committee should begin early in the project to develop the governance and management structure for the Town's archival facility. Critical areas to discuss and define are building ownership, funding, staffing, administration, and operations.

Develop Policies and Procedures

The Advisory Committee should begin to draft critical policies and procedures regarding the organizational requirements, operations, and the management of a shared archival facility. It is important for policies and procedures to be developed early in the planning process. Defined policies and procedures will assist in leading the many discussions about the scope and nature of the archival facility and help develop an appropriate Memorandum of Understanding (MOU). The many issues are discussed in sections 7 and 8. Some of the more immediate policies to be discussed are the scope of the project and the collections, terms of partnership, custody of records, and the future access of the records.

Partner Discussions:

Critical discussions about the future organizational requirements, operations, and management of a shared archival facility must take place between the potential partner institutions. By the end of the project, a draft Memorandum of Understanding (MOU) will outline the agreed organizational requirements and the policies and the procedures for a Marblehead Archival Facility.

Storage Capacity Requirements:

The estimated quantities of holdings in this report are based on reports made by the potential partners

and the observations of Pacifico and Johnston. They are incomplete, particularly for oversized records, special media records, and art/artifacts. Further survey work is needed to obtain more accurate estimates of the various types and sizes of records and their shelving requirements.

Site Selection:

The Advisory Committee needs to identify a site or sites that can accommodate the shared facility requirements and allow for future growth. Are there existing buildings that can successfully be adapted for the archival program? Is there vacant land available that meets the requirement for the construction of a new archives building? The Town's Building Inspection Department should be enlisted in assisting with the identification of candidate sites to determine the best options and relative costs.

Master Plan:

The end product of the archives project will be a master plan that defines the organizations to be included in the new archival facility, their unique conditions and constraints, and a program of requirements for a Town Archives.

Conclusion

Building any new archival facility is an exacting and complex task. Creating a new archives facility for multiple partners with specialized requirements adds another layer of intricacy. Yet it is not only possible as illustrated by other successful shared archival buildings, but is increasingly more common. Faced with greater demands on shrinking resources, joint collaborations are optimal strategies for the future of archives.

There are many challenges ahead. To be successful, the partners must employ a systematic and team approach that values clear communication and compromise. They need to examine best practices but also be willing to consider different approaches that respond to a changing world and that can lead to new opportunities.

With this study, Marblehead shows their commitment to protecting the historical records of their Town. It is truly an exciting opportunity for Marblehead to build a permanent home for their archives.