Surveying
Your Collection

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American Ancestors
by New England Historic Genealogical Society

Voice of Judy Lucey Archivist

Organizing and Preserving a Family Archive

Where did I put that family chart?!?

Items stored in trunk in a garage

What is your goal?

- Focusing your genealogical research
- Writing a genealogy
- Donating to a repository
- Giving to the next generation
- Downsizing

The Archivist's role

Getting Started

1. Survey the collection: Identify what you have
2. Triage possible and existing preservation issues
3. Place items in proper enclosures: Do I need to re-house anything?

What is a survey?

A survey looks at general subject matter, identifies formats of material, any pre-existing arrangement, notes the condition of materials and preservation needs, as well as, rehousing needs

JHC archivists surveying a new arrival of records at NEHGS

What isn't a survey?

- It's NOT organizing
- It's NOT an inventory
- *These steps come later!*
- A survey and initial triage can take a few passes
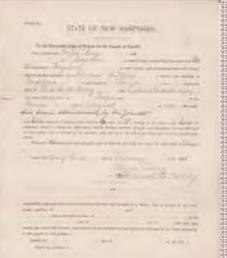
Tip
Resist temptation to begin organizing

Basic Components of a Survey

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Survey worksheet

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Identify document types

1903 travel diary

1898 Adoption Petition

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Identify other formats

Tip
Handle materials gently

Arrangement

- Is there an order to the materials?

- Are the materials in labeled folders? Does the folder label match up to the contents?

- Photos – loose?
  In albums? Identified?
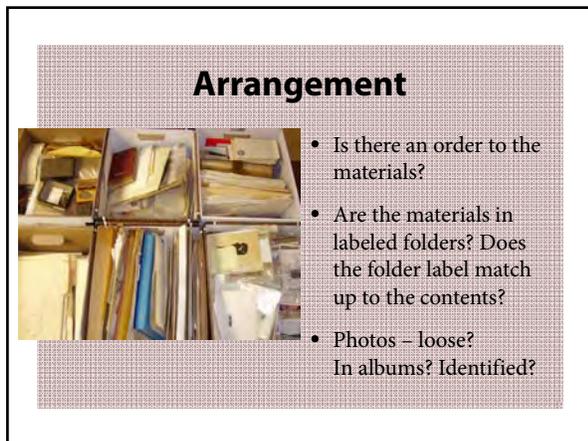
Review current storage methods

- File cabinets and folders

- Binders

- Digital media
  - Computer
  - CDs/DVDs
  - Flashdrive
  - Audio and video tapes

What do I keep?

Save

- Genealogical research
  - Family group sheets, charts
  - Compiled genealogies, narratives
- Vital records (originals and copies)
- Journals, diaries, ledgers
- Correspondence, cards, invitations
- Deeds, estate papers
- Bibles with family records
- Educational and military records
- Scrapbooks, autograph books
- Photographs, photo albums

What about…

- Newspapers
  - Keep clippings of obits, announcements
  - Entire newspaper?
- Genealogical research collections
  - Pamphlets, brochures
  - Conference or class materials
  - *Weed out duplication*!!!!
- Club, church, or genealogy newsletters
  - Anything related to your family?
  - Consider keeping representative copy

Getting Ready

✓ Gather all materials together in one area

✓ Clear a large workspace with plenty of light

✓ Have a genealogical chart or report handy

✓ Have your survey worksheet ready

✓ Wash your hands!

When to do a survey?

- Make sure you can devote time to the project
- Can do this process in chunks
- It's an ongoing process

Preservation Issues

Preservation vs. Conservation
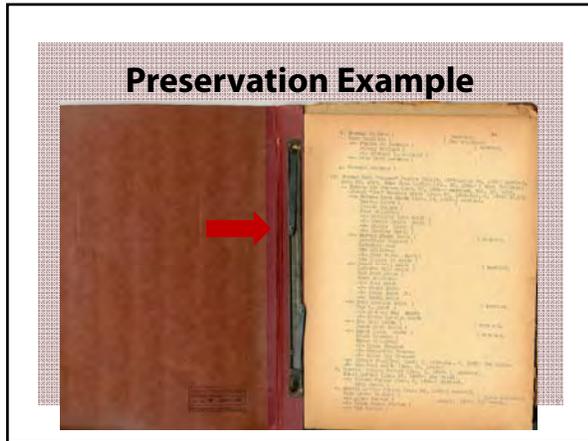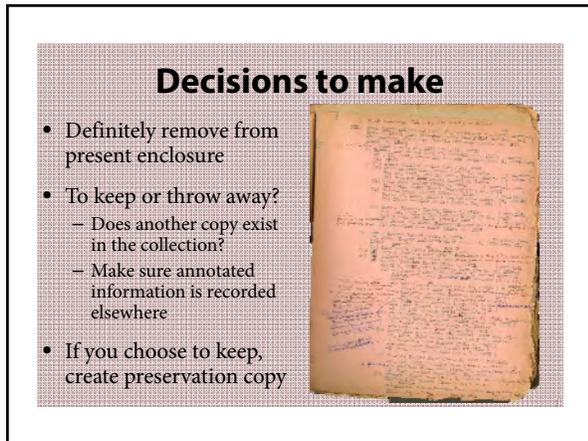
Identify preservation issues

What's Bad

- Rust - paper clips, staples, etc.
- Rubber
- Folds/creases
- Adhesive - tape, glues, etc.

- Mold
- Insects and rodents
- Humidity
- Light
- Temperature

Preservation Example

Preservation Example

Decisions to make

- Definitely remove from present enclosure

- To keep or throw away?
  – Does another copy exist in the collection?
  – Make sure annotated information is recorded elsewhere

- If you choose to keep, create preservation copy

Do no harm!!!

Image from Marion Emerett Colman Scrapbook from Florida State Special Collections

Conservation Example

Insect damage   Mold on diary

www.conservation-us.org

www.nedcc.org/free-resources/overview

Storage and Enclosures

Storage Best Practices

- Store papers inside folders or boxes
- Try not to crowd papers
- Make sure items fit enclosures
- Don't mix your materials
  - Separate newspaper from family letters or photos stored paper

Storage Options

- Ideally, store scrapbooks, albums flat, and oversized documents/items
- Place loose photos in album or other archival quality containers

Bound Volumes

- Don't take apart if possible

- Falling apart?
  - Remove items
  - Store separately
  - BUT keep in original order

Storage options

Clamshell box from Gaylord Supplies

Possible Storage Options
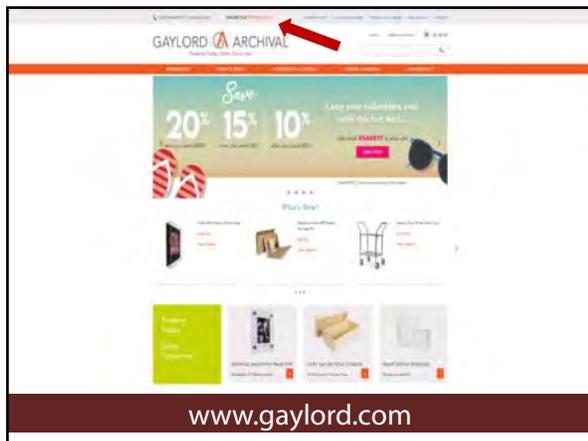
Artifacts

Why Archival Supplies?

- Provides a stable environment for materials

- Prioritize your needs
  - Can't afford?
  - Use present enclosures but monitor for possible deterioration

- Acid-free, lignin-free
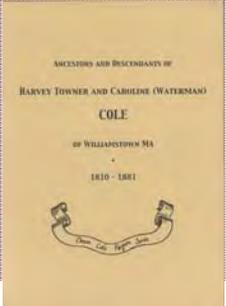 - Buffered vs. Unbuffered storage materials

NEHGS Special Collections Stacks

www.gaylord.com

Surveying a collection: A Case Study from NEHGS

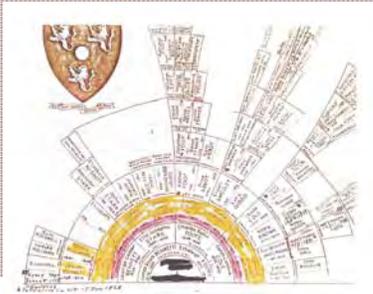
George Wirt Clapp Family Collection

- Bennett, Foote, Cole, and Stark families

- Mix of genealogical research and family papers and photos

- Papers passed down to descendant (niece) of the compiler

ANCESTORS AND DESCENDANTS OF

HARVEY TOWNER AND CAROLINE (WATERMAN)

COLE

OF WILLIAMSTOWN MA

1810 - 1881

First step

Consulting family chart for relationships

Survey worksheet

Carton contents

Remove rusty clips

Cole-Foote family items

Bound volume in collection

Photo album

Provenance of photo album

- Album of Sarah Caroline Cole Foote
- Placed in box on 25 July 1957 by Caroline Bennett Fogle to Louise (Bennett) Clapp
- Box not opened until 24 July 1983!

What should we do?

- Speak to conservator?
- Make preservation copy?
- Should I remove them??

The purple box

- Found in carton labeled "Cole-Foot Family Papers"
- Content label "Foote-Cole letters 1824-1928"

Let's take a look…

Example

- Folded manila envelope with seven letters
- To do?
  - Let's remove the contents to check condition
  - Next identify the people with initials HTC and SCF

Contents

- Letters are curled
- Tears in two of the letters along the fold
- Identified SCF as Sarah (Cole) Foote and HTC as her father, Harvey Towner Cole
- What to do?

Remove rubber bands

Handwritten recipe book

Condolence letters

Aug. 1873 Consists of
Condolence letters
re: Harold
several from
CAF

Some of the contents

Baby's hair

1873 poem baby Harold's
death by Asahel Foote

Dried flowers taken from Baby's
hand

Oversized Documents

Digital media

Found original letters!

1824-1828 letters by Solomon Foot to his first cousin, Asahel Foote, Jr.

Can we access genealogical data?

Review Survey sheet

Review and Next Steps

✓ Completed a survey of our collection

✓ Identified and triaged preservation issues

✓ Identified necessary supplies for proper storage
  ✓ Rehouse your collection

• Deal with specific formats

• Digitize and create preservation copies

• Organize

THANK YOU!

AmericanAncestors.org/Education