

Preserving Your Family History Research: Documents, Bound Volumes, & Photographs

Organizing Your Family Papers and Preparing for Donation to a Repository

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Getting Started

As family historians we hold on to everything—from photos, to letters, to diaries, to heirlooms, to genealogical notes, to receipts. As you become known as the family “keeper” and relatives pass on items to you, piles can quickly multiply. Organizing helps reduce the risk of losing your items and preservation measures prevent damage to fragile papers, photos, and other items.

Before beginning the process, it’s important to establish a goal. You may be:

- Focusing on your genealogical research
- Writing a family history book
- Donating to a repository
- Giving to the next generation
- Downsizing

The First Step: Identify what you have and begin to organize

In the archives profession, the first steps we take with an incoming collection are called the “appraisal” or a “survey process.” This is when we assess a collection and determine its contents and what to keep permanently. This is probably the hardest step any family historian must do. The goal here is to keep records and items that are significant to you and have lasting value.

Some items worth saving:

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

Additional steps to take in this process:

1. If you have letters, diaries or scrapbooks and other items, identify the creators of each.
2. Identify family photographs, if possible. It is best not to write on the back of photos but if you do go this route invest in an archival quality pencil.
3. Organize family papers by surname and within each family place papers created or about an individual in a folder or several folders.
4. Organize letters by recipient and place them in chronological order. Don't discard the envelopes, keep them with the letter.
5. Place family charts, group sheets and any compiled genealogies at the beginning of each family group. This will serve as a road map for future users and show how these people are related.
6. The key to your genealogical research papers is organization. Develop a system that works for you and stick with it. If you house your research, for example, in notebook binders, organize by family.

Arrangement vs. Description

Arrangement

Analyzing what you see:

- Who or what created them
- What or how they were created
- What they document
- When were they created
- Using this analysis to organize materials within a collection.

Description

- Laying out and explaining the arrangement.
- Describing what the materials are and where to look to find them.
- For archives: sharing the knowledge of this collection with others.

The Next Steps: Store and Preserve

1. Store books, documents and photographs in clean, insect-free areas. Keep temperature and humidity moderate and stable.
2. The ideal temperature is 60 to 70 degrees F but no greater than 75 degrees F. Relative humidity should be less than 65%. This will help prevent mold growth and insect activity. Try to store paper in an interior room in your house away from heat and water sources. Avoid storing records in attics and basements or any area in your home that can experience large temperature fluctuations.
3. Protect materials from direct exposure to light sources. Light, especially sunlight and fluorescent lighting, accelerates deterioration. Consider displaying copies of photos and documents instead of originals.
4. If you choose to display original photographs or documents, display them in a hallway or another area of the house away from windows or other light sources. It is always preferable, however, to frame copies and store the originals!!

5. Remove staples, paper clips and rubber bands from documents *carefully*. Avoid using liquid glues or metal fasteners on paper documents and photographs. Stainless steel paper clips are fine to use to clip documents together if the paper is strong enough. If some of the paper in your collection is brittle or fragile, avoid using fasteners.
6. Remove letters from envelopes and store flat. Unfold other paper documents and store flat. Over time, folded documents will tear at the folds.
7. Store oversized paper and collections flat, try not to roll or fold. If you have a large family chart, for example, that is rolled, secure it in an archival quality paper tube that is buffered with low-lignin content. Make sure the tube is about two inches longer than the document. The National Archives provides a very good photo demonstration of this technique at <https://www.archives.gov/preservation/family-archives/storing>

Don't forget – Purchase archival quality material

1. Store family papers and other ephemera in acid-free, lignin-free folders and boxes.
2. Items handled frequently should be placed in plastic enclosures. Just keep in mind not all plastics are created equal. Try to purchase archival quality plastic enclosures. Look for plastic sleeves made of polyethylene, polypropylene and polyester.
3. Purchase your supplies from a reputable archival vendor (see separate list of vendors) The cost will be more, but you will be insuring the long-term preservation of your family treasures.
4. Most scrapbooks and photo albums sold commercially are not made for long-term preservation of materials. Invest in albums or scrapbook materials which have alkaline buffered paper. Interleave existing scrapbooks and photo albums with buffered paper.
5. Photocopy newspaper clippings on lignin-free paper or scan them for long term preservation. If you want to keep clippings in a scrapbook or with other materials, interleave newsprint with thin sheets of alkaline buffered tissue.
6. If you choose to preserve your newspaper articles and clippings, purchase archival quality enclosures from a reputable vendor. If you want to keep and store newspapers, refold newspapers along the center fold with the edges aligned. Store in archival quality enclosures.
7. Try to keep similar items together. Don't mix photographs with documents or newsprint as this can lead to problems. The chemicals from one type of paper can be absorbed by other types and cause discoloration and disintegration.
8. The size and shape of the enclosures you purchase should match as close as possible to the size of the documents or ephemera you have. In some cases, you may need to order custom size enclosures.
9. Label your folders and boxes with soft lead pencil or archival quality pen. Use full names when labeling – don't use "Aunt Susie Q's letters". This may not mean anything to future generations.

Glossary of terms

Acid is a substance that eats away or dissolves things. It's added to the production of paper so that it is easy to write on. "Acid-free" paper means that the paper has a ph. of 7 (neutral) or slightly above 7 (alkaline). If a paper is "acid-free" with no buffering agent its long-term preservation is doubtful – over time it will become acidic.

Lignin is a compound found in plant cell walls and provides strength in wood. Think about those browning newspaper clippings – this is due to the lignin causing acid to the paper fibers.

Buffered paper means that a buffering agent (usually calcium carbonate or magnesium carbonate) has been added to the paper pulp, neutralizing the acids. Paper that is “lignin-free” usually has a buffering agent added to it so the paper lasts a very long time. Most papers items can be stored in buffered enclosures. Sometimes you will see the term **unbuffered** for certain archival enclosures. Materials made from animals such as silk, leather-bound books, pearls, wool, etc. require unbuffered enclosures. Blueprints and cyanotype photographs, also, do.

Online Resources

As you undertake the project of organizing and preserving your own research and family papers, it is always important to learn and understand the various methods for caring for your treasures. Here are several websites that do a very good job of covering the basics. American Ancestors archivists maintain a more comprehensive list of online resources. Please contact us if you do not find anything from the list below that meets your needs.

American Institute for Conservation, Guides for Taking Care of Your Belongings
<https://www.culturalheritage.org/about-conservation/caring-for-your-treasures>

Library of Congress, Preservation and Collection care www.loc.gov/preservation/care/

Northeast Document Conservation Center, Preservation of Private and Family collections
<https://www.nedcc.org/free-resources/preserving-private-and-family-collections/caring-for-private-and-family-collections>

The Family Curator, hosted by Denise May Levenick, a family historian and blogger
<http://thefamilycurator.com/>

U.S. National Archives and Records Administration <https://www.archives.gov/preservation/family-archives>

For items effected by natural disasters, <https://www.archives.gov/preservation/disaster-response/guidelines>

New York Times Article – *Tips on Archiving Your Family History, Parts 1, 2 and 3* published on May 29, 2013, June 5 and 12, 2013 <http://www.nytimes.com/2013/05/29/booming/tips-on-archiving-family-history-part-1.html?pagewanted=all> or use Google or any other search engine and key in article title. This series of articles covers preservation issues involving everything from old documents to cassette tapes to preserving digital images.

Why Donate your Collection?

Archives, historical societies and special collection libraries are run by professionals – archivists, curators or librarians. While their priority is the long-term preservation of collections in their care, these repositories can also provide:

1. Environmentally controlled environment in a secure location.
2. Oversee proper handling and use.
3. Research access to your papers.

What to Preserve

Your ancestor's 1863 letter detailing his account of a Civil War battle he participated in is an important family treasure, but did you know it may be of value to others? Your family papers and photos can provide essential clues to the past for researchers. When you donate your family collection to a repository, your family history becomes part of your community's collective memory.

This list represents some of the types of materials in personal and family papers that are valuable to researchers:

- Letters
- Diaries, journals
- Scrapbooks
- Speeches
- Research Notes
- Autograph books
- Educational and military records
- Photo Albums, Photographs
- Business records
- Legal records
- Ledgers
- Genealogical Information
- Professional Files
- Video & Audio Tapes

What do I need to consider before making a donation?

Do your homework before donating your collection. Contact the repository to find out what their collection policy is. Usually a repository has their collection policies posted on their website, and you can certainly start there, but you should always contact the archivist directly to learn more about the types of records they do accept.

In initial discussions with repository staff, ask about how the staff will store and care for the collection. In addition, find out more about the staff. Are they paid, professionally trained archivists or volunteers? Because of the unique nature of manuscript materials, it can take a long time to process a collection. Do ask how long it takes to make collections available for use.

Questions to consider asking the staff at a repository:

- Do I need to reorganize or remove anything prior to donation?
- Do I have to donate money for the care of my collection?
- Can the archives staff give me a monetary appraisal of my collection for tax purposes?
- What are your policies for access?
- I want my private papers restricted for 25 years, how does that work?
- Do you plan on digitizing my collection in the near future?

- In addition to paper documents, do you accept digital files? For example, will you take my genealogy software program?

Some Terms Archivists Use

Accession record is a document or file documenting the physical and legal transfer of materials to a repository. It helps archivists to capture in one place information that is often scattered in many different documents. Accession records at American Ancestors include the name and address of the donor, collection or item name, volume or quantity of material received, names, dates and types of records within the collection. The accession record also helps us track whether an acknowledgement letter or deed of gift has been sent and whether the materials were purchased or donated to the Society. We often include supporting documentation, such as preliminary correspondence or e-mails and any information on rights and restrictions.

Cataloging is the process of providing access to materials in a repository by creating formal descriptions to represent the materials and then organizing those descriptions through headings that will connect user queries with relevant materials.

Copyright A property right that protects the interests of authors or other creators of works in tangible media (or the individual or organization to whom copyright has been assigned) by giving them the ability to control the reproduction, publication, adaptation, exhibition, or performance of their works. Copyright belongs to the creator of writings and other original material such as photographs or a compiled genealogy but can legally be transferred to heirs or others. Ownership of copyright is separable from ownership of a physical item (a letter or photo, for example).

Deed of Gift is a formal and legal agreement between a donor and repository that transfers the ownership of and legal rights to the donated materials. A deed of gift that has been signed by the donor and the repository establishes the legal status of the materials.

Finding aid is a description of a collection that gives the repository physical and intellectual control over the materials and that assists users to gain access to and understand the materials. It is a single document that places the materials in context by consolidating information about the collection, such as information about acquisition and processing; provenance, including administrative history or biographical note; scope of the collection, including size, subjects, media; organization and arrangement; and an inventory of the series and the folders.