



Society Strategies

Federation of Genealogical Societies

P.O. Box 200940 Austin TX 78720-0940

Series Set VII Numbers 1&2

September 2001

Set VII Strategies for Librarians

Genealogical Society Relations with Libraries

by J. Caryle Parker

Supplemental Page

This strategy paper, written some years ago, is an FGS *Classic* that contains ideas and strategies still relevant today in society management.

This paper presents the society relationship with a library which houses the genealogical collection compiled by the organization, and the society's role in the development, growth, preservation and reference services for the collection.

The information on pages 4 which directs the interested person on how to obtain copies of this paper is incorrect.

The FGS office no longer reprints the SSS papers, and has phased out paper copies of the SSS papers altogether.

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Society Strategies

FEDERATION OF GENEALOGICAL SOCIETIES

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Series Set VII Number 1

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The FGS Society Strategy Series consists of papers which offer suggestions and instructions for innovative and effective management for genealogical and historical societies. The Federation holds a copyright to this material. A list of sets and ordering information appears at the end.

Set VII Strategies for Librarians Genealogical Society Relations with Libraries - Part 1 of 2 by J. Carlyle Parker

INTRODUCTION

Most libraries have genealogical materials in their collections. The questions are: Should there be a separate genealogical collection? How large should it be? What should it contain? What should a genealogical society's role be in its development, growth, preservation, and the reference service for it?

Answers to these questions and additional ideas are presented in this paper.

OBJECTIVES

Libraries set their own service objectives or collection development policies.

A society's objective should be to see that there are genealogical materials available in a local library to assist the genealogists of the local community, surrounding communities or service areas. The society should also ensure public access to additional genealogical materials that may be provided by other libraries through interlibrary loan.

TYPES OF LIBRARIES

City, county, and regional public libraries are not the only libraries that may be interested in expanding their genealogical holdings. There are also historical societies and college and university libraries (tax supported, private, denominational and secular) to consider.

CORRELATION

Local history, local biography and local genealogy are inseparable. Many public libraries have fine collections in regard to these three subjects. Some county histories, biographies and genealogies may need to be selected and acquired through a correlated effort by the libraries of a county or a region. If permitted, societies could help with this correlation. Members could prepare a union catalog of genealogical holdings for libraries without online catalogs.

No library can collect all these same types of materials that relate to their patrons' ancestors from other communities throughout the world. Therefore, interlibrary loans and referrals are very necessary. Fortunately, the Internet and

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Web sites for family genealogists can help, as long as the researcher obtains documentation for information thus acquired.

PHYSICAL NEEDS

Space: If a society requests a separate section, area, or a room for the genealogical collection in a library, then it may be necessary for them to raise the funds for its construction, furnishings, and maintenance. Under such an agreement the library could also ask the society for funds for staffing such a facility, as well as requesting an endowment. Of course, very few societies could afford any such requirements.

Security: Special sections, areas, rooms, locked cases, and other security devices are the jurisdiction of the library and should not be suggested or demanded by societies.

LIBRARY VOLUNTEERS¹

Reference Service: Assisting genealogists with their research in a library is part reference, part referral, and part tutorial.

Reference: Librarians are trained to interview patrons to determine their needs and then refer them to the appropriate tools. In many cases they help patrons find answers, as well as teaching them how to use the library and the reference materials recommended. In libraries where the librarians are also trained or experienced in genealogical research, librarians may not wish to relinquish all of the interviewing, teaching, and advising to genealogist volunteers.

When the library requests or allows a society to have genealogist volunteers provide all or some of the reference services concerning genealogy, the society's volunteers have an obligation to learn as much as possible of the reference skills that are required of a librarian to serve the genealogy patrons.

Referrals: For recommending additional libraries, archives, agencies and services, volunteers need to know where these places are and what they have and can do for genealogists. For example, know the reference tools that contain addresses, know what the services and holdings are of the nearest Family History Center, and be able to identify other libraries and archives of the area with materials of use to genealogists.

Tutorials: Tutoring for genealogical research generally includes helping patrons to fill out pedigree charts and family group records, and to learn how to use various research tools and equipment. It may also include assisting a patron with the reading of difficult parts of a record and interpreting contents of records.

Library Policy for Volunteers: Society volunteers must adhere to the library policies concerning library volunteers and must know the emergency procedures of the library.

Library Liability Policy: Many libraries have a standard liability policy for volunteers, and genealogical societies should make sure that all of their volunteers are protected by it.

Training: Some libraries offer and require a general volunteer training program. A few libraries may also have a special training program for genealogical volunteers. Nevertheless, the society should have its own program to augment any library training.

Badges: Society volunteers should wear a badge stating that they are volunteers.

LIBRARY PROJECTS

All society projects planned and intended for the library should meet with the approval of the librarian in charge of the genealogical collection and its services.

The following are project examples:

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- Survey society members and library genealogical patrons concerning their research interests and needs.
- Determine what the prominent national and ethnic groups of the library's community are and offer suggestions to the collection development librarian as to the genealogical reference materials that may assist these groups.
- If permitted, assist the librarian with (free, or for the cost of postage and photo-duplication), the library's genealogical correspondence.
- Index the obituaries of the area newspapers.
- Create every-name indexes to city and county histories and federal censuses (and state censuses, if they exist).
- Abstract and create every-name indexes of vital records, probates, and land records.
- Compile tax lists and/or voter records for dates of genealogical value that are not covered by other records such as census schedules.
- Maintain a genealogical page(s) that is part of the library's Web site. Note: the library Web site should be in compliance with the Americans with Disabilities Act² making the Web site easy to navigate, containing large print and few graphics.

The demands of the library Web site and general genealogical correspondence can be lightened with a society page and participation in the online GenWeb program available at <<http://www.usgenweb.com>>. A society page or Web site should be linked to as many quality area sites as possible.

FUNDING

Fund Raising: The society may wish to conduct fund-raising projects to augment funds contributed from membership dues.³ These funds could be contributed for the acquisition of genealogical materials.

LIBRARY NEGOTIATIONS

All negotiations should be made with the library director or appropriate staff persons. Only at an impasse should a society approach the governing board, and not before informing the library director of such a plan.

LIBRARY CONTRACTS

A formal contract, not just a "handshake" agreement, is advisable if a portion of a society's contributed funds will be expended for genealogical materials or other support of the library's genealogical collection. For an example of a contract, see footnote⁴.

POSSIBILITY OF EVICTION

Occasionally, and usually because of the lack of space, some libraries have reduced, or asked societies to accept and remove the library's genealogical collection. A society may, through negotiation with the library director, convince a director to move a collection to a branch library, if it has any.

Retention Justification: One helpful evidence to defend keeping the genealogical collection may be statistics of the genealogical collection's use, including use by visiting genealogists and how they beneficially impact the economy of the community in which the library is located.

Another statistic that may help is to illustrate the number of genealogical volunteers who have aided the library, the hours served, and the longevity of some volunteers' service.

If negotiations with the library director are not successful, inform the director that the society will ask for negotiations with the library's governing board. In some cases, it may be useful to try to obtain the services of an independent arbitrator.

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Another option is to ask other libraries if they would accept transfer of the genealogical collection. Possibilities are historical societies, college or university libraries, church libraries, adjacent counties' libraries, their genealogical societies or historical societies.

The final solution may be to create a society library. Be sure to consider the disadvantages, problems, and expenses related to this solution.⁵

NOTES

1. The Federation of Genealogical Societies, *Society Strategies Series*, Set 1:14. "Strategies for Societies, Volunteers: Finding Them & Keeping Them." by Karen Clifford, Austin, Texas: FGS, 1998. This paper has many recommendations that should be applied to society volunteers serving in libraries.

2. Minow, Mary. "Does Your Library's Web Page Violate the Americans with Disabilities Act?" *California Libraries* 9 (April 1999): 8-9.

3. The following publications offer useful fund raising ideas: the Federation of Genealogical Societies, *Society Strategies Series*, Set 1:4, "Strategies for Societies, Projects for Fundraising." by Sandra Luebking, Austin, Texas: FGS, 1992; and *Fundraising for the Small Public Library: A How To-Do-It Manual for Librarians*, by James Swan, New York: Neal-Schuman, 1990.

4. The Federation of Genealogical Societies, *Society Strategies Series*, Set 3:3, "Moving Your Collection to a Public Library," by Edward E. Steele. Austin, Texas: FGS, 2000.

5. Ibid.

ABOUT THE AUTHOR

J. Carlyle Parker, Librarian and University Archivist, Emeritus, California State University, Stanislaus; author of several genealogical reference tools; and founder and director (volunteer), Modesto California Family History Center, 1968-1990, and Turlock California Family History Center, 1990-1997.

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Set VII Strategies for Librarians Genealogical Society Relations with Libraries - Part 2 of 2 by J. Carlyle Parker

INTRODUCTION

Part one of this two-part series discussed space and security in a library housing a genealogical collection, the use of library volunteers, society projects to benefit the genealogical collection, and fundraising, negotiations, contracts, and potential eviction.

COLLECTION DEVELOPMENT

The library sets its collection development policy and procedures. The books, articles, audio tapes, journals, and listserv shown below can assist in collection development. If the librarians of your library do not know of these tools, please bring them to their attention.

- Witcher, Curt B. "Personal, Professional, and Society: A Genealogy Collection for Every Library." Lecture at FGS conference in St. Louis, 1999. #W15, p. 39. Audio taped by Repeat Performance, Hobart, IN 46324; telephone: (219) 465-1234; <<http://www.audiotapes.com>>.
- Kemp, Thomas Jay. "The Roots of Genealogy Collections." *Library Journal* 124 (April 1, 1999): 57-60.

- Book reviews of the History Section of the *RUSA Update, Reference & User Services Quarterly, Library Journal* and genealogical journals and quarterlies.
- Swan, James. *The Librarian's Guide to Genealogical Research*. Fort Atkinson, Wis.: Highsmith Press, 1998.
- Moore, Dahrl Elizabeth. *The Librarian's Genealogy Notebook: A Guide to Resources*. Chicago: American Library Association, 1998.
- Librarians Serving Genealogists' (LSG) GENEALIB electronic mailing list <lyris@lists.acomp.usf.edu>.
- Reid, Judith P. "Branching Out into Genealogy." *Library Journal* 117 (November 1, 1992): 51-55.
- Parker, J. Carlyle. *Library Service for Genealogists*. Gale Genealogy and Local History Series, v. 15. Detroit: Gale Research Company, 1981. (Somewhat out-of-date, but not superseded.) Second edition in progress. Turlock, Calif.: Marietta Publishing Co.

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Guidelines: The American Library Association "Guidelines for Developing Beginning Genealogical Collections and Services" can help librarians with acquisitions for new and established collections. The Genealogy Committee of the History Section of the ALA prepared them.

Societies may wish to consult them for various reasons. One may be to learn the guideline recommendations of professional librarians and see how the society can help the library meet those guidelines. Also, if your librarians are not aware of these guidelines, please provide them with a copy.¹

Gifts: Gifts should meet with the approval of the librarian concerned with collection development. Because the library can usually obtain greater discounts from publishers and library jobbers (wholesalers), gifts that would require ordering by a society would be better acquired by the library with donated funds.

Local Genealogical Society Publications:

Local genealogical society publications (including newsletters) that relate to the library's service area should be donated to the local area libraries. Two gift copies of society published abstracts, indexes, etc. should be sent to the Library of Congress, Washington DC 20559 for their collection and for inclusion in national computer databases, unless they have already been sent to the Copyright Office.

Also, one gift copy should be sent to the Family History Library, 35 North West Temple Street, Salt Lake City UT 84150, with a letter of permission to microfilm the publication. This would make the publication available worldwide through the Family History Library's microfilm loan program for its Family History Centers.

Gift copies should also be sent to at least the major genealogical libraries located within the society's state.

Genealogical Journals, Quarterlies, etc.:

Most libraries are happy to receive gift copies of magazines as long as they are of excellent quality and received regularly and timely.

Newsletters: The library may not wish to accept newsletters of non-area societies received by society subscription or exchange. Their addition to the library collection can be very labor intensive. As an alternative, the genealogical society could ask a member to organize the newsletters (either alphabetical by state or by region of the United States or international), and then bring them to the monthly meetings for member viewing.

Microfilmed Local Public Records

Acquisitions: The society should encourage and assist the library in obtaining local records that have been microfilmed by various firms or the Family History Library, Salt Lake City (Genealogical Society of Utah). With a permission-to-do-so letter (usually from the county clerk), the Family History Library permits libraries to purchase their microfilmed local records. For their holdings consult the Family History Library Catalog, Locality Catalog at a Family History Center or online at <<http://www.familysearch.org>>.

The address and telephone number for this service is: Field Services Outside Sales, Family History Library, 50 East North Temple, Salt Lake City UT 84150; phone (801) 240-1290.

CIRCULATION

It is imperative that as much as possible of genealogical collections should be permitted to circulate on interlibrary loan.

Local genealogy and history materials should all be in duplicate copies, either purchased, photoduplicated, microfilmed or microfiched for circulation and for the preservation of materials that are heavily used, fragile or rare. These processes must be made within the

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provisions of the copyright laws or with written permission of authors or publishers.

At present most firms providing these services consider 1906 as a safe date for materials to be out of copyright. The date of 1906 is earlier than the law states, however, a copyright attorney should be consulted to evaluate each title considered for duplication.

The duplicate copies of materials in microform can also assist in their circulating on interlibrary loan, including census schedules and newspapers.

Interlibrary Loan: Societies should encourage libraries to circulate as many of their genealogical materials as possible to their local patrons and on interlibrary loan. Such circulation may necessitate the purchase of additional copies, a standard practice for other subjects in most libraries for titles in great demand or needed for both the reference collection and circulating collection. Societies could offer to fund the purchase of duplicate copies for circulation or, offer to fund the microfilming of rare and fragile materials.

Some libraries have developed self-defeating policies of non-circulation of genealogical materials, while requesting other libraries' genealogical materials for use via interlibrary loan. Societies should encourage librarians to make their genealogical collections become interlibrary loan lenders instead of borrowers.

Some libraries assume that because they interlibrary loan materials from their general collection (but not their genealogical materials) that they qualify to borrow genealogical materials on interlibrary loan from other libraries. Such attitudes do not follow the spirit of the "National Interlibrary Loan Code for the United States" (1994).²

CATALOGING

If the cataloging of genealogical materials appears to be slow in some libraries, note that

many genealogical titles do not appear in library computerized databases and therefore are not easy to catalog. Also, the addition of genealogy books is a minor part of the huge workload of a cataloging department.

Genealogists should not expect a library to classify and shelve books in alphabetical order by state. Neither the Dewey Decimal nor the Library of Congress classification schemes will permit such an arrangement; the schemes were developed long before all the states were admitted into the union.

PRESERVATION

Assistance in the library's preservation program may be helpful, part of which could be to invite the Family History Library to microfilm rare collections and indexes. Also, assistance may be welcome in the financing of microfilming materials not of interest to the Family History Library, such as newspapers and city and/or county directories.

The Genealogical Committee of the American Library Association has also prepared guidelines relative to the preservation of a library's genealogical materials.³ Some catalogs of preservation materials and how to use them are Gaylord Archival Storage Materials & Conservation Supplies, telephone (800) 634-6307, Conservation Resources International, telephone (800) 634-6932, or Metal Edge International, telephone (215) 699-8755).

Digital storage of precious materials is not stable enough for adequate long-range preservation.⁴ It cannot compare to the proven record of the longevity of microforms.

DISCARDS

Libraries should be encouraged to offer on exchange to other libraries, library materials in excess of those necessary to support their patrons for circulation and interlibrary loan. An excellent source for this is through the services of Librarians Serving Genealogists'

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(LSG) GENEALIB electronic mailing list <lyris@lists.acomp.usf.edu> (provide no subject. Type "subscribe genealib" and your first and last name in body of the message).

GROUP RESEARCH TRIPS

Societies planning group research trips to any of the popular genealogical and historical libraries should inquire of them when the best time for such a visit would be. Leaders of trips to the Family History Library should comply with the instructions in "Guidelines for Visiting Groups" from the Public Relations, Family History Library, 35 North West Temple Street, Salt Lake City UT 84150.

CONCLUSION

Genealogical societies should support their local library's genealogical holdings or collection within the bounds of the library's objectives, policies, and procedures.

NOTES

1. "Guidelines for Developing Beginning Genealogical Collections and Services." *Reference and User Services Quarterly*; 39 (Fall 1999): 23-24. Free reprints available from the Reference and User Services Association, American Library Association, 50 East Huron Street, Chicago IL 60611; or from the Web site at <http://www.ala.org/rusa/stdn_beg_gene_col.html>.

2. "National Interlibrary Loan Code for the United States" (1994). In *American Library Directory, 2000-2001*. 53rd ed. New Providence, NJ: R.R. Bowker, 2000, pp. 2307-09; or on the Web site at <http://www.ala.org/rusa/stdn_inc.html>.

3. "Guidelines for Preservation, Conservation, and Restoration of Local History and Local Genealogical Materials." *Reference & User Services Quarterly* 32 (Spring 1993): 341-44. Free reprints available from the Reference and User Services Association, American Library Association, 50 East Huron Street, Chicago IL 60611; or <http://www.ala.org/rusa/stdn_gen_local.html>.

4. Sottong, Stephen. "Don't Power Up that E-book Just Yet." *American Libraries* 30 (May 1999): 50-53. A section of this article, "Data permanence," addresses the pitfalls of digital storage.

ABOUT THE AUTHOR

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