

The Home Archivist: Preserving Family Records Like a Pro!

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Genealogists are a lot like archivists. They have boxes of records, ephemera, photographs and artifacts in their genealogical records collections. Both genealogists and archivists have a responsibility to preserve and archive these records so that they will survive for future generations to enjoy as generations before them have done. Learning how to archive family records is a must for all genealogists.

A Dedicated Space

Archivists have work tables and work rooms dedicated to working on processing records. Genealogists should do their best to do the same, even if it's a small area in your home.

- A dedicated work space allows you to only focus on the specific records in front of you.
- Keeps you from mixing up records that don't belong in the collection you are working on.
- A place to have archival materials and the home archivist tool box ready to work on family records.

Original Order

When archives receive a donation of boxes of records, one of the first rules we follow is "Original Order". The definition of "original order" is: *The organization and sequence of records established by the creator of the records.*

Original Order is a fundamental principle of archives. Maintaining records in original order serves two purposes:

First, it preserves existing relationships and evidential significance that can be inferred from the context of the records.

Second, it exploits the record creator's mechanisms to access the records, saving the archives the work of creating new access tools.

Source: Society of American Archives Glossary of Terms
<https://www2.archivists.org/glossary/terms/o/original-order>

Likewise, genealogists may have boxes of records that came from a relative that are in "original order" and keeping that order as much as possible is important to understand the records and the person who compiled those records.

Many of us will still have collections of records that have no order to them and that is found in archives settings as well. It is then up to the home archivist to impose an order to the collection for processing. This order could be date order or arranging records by surname.

Binders, Folders or Boxes

The method you choose to organize and archive your genealogy research is purely a personal decision. In the archives, we have set standards that we follow to archive a records collection but the home archivist can use the method that works best for them.

- **Binders:** Some genealogists choose the binder method where they put all their genealogical records in sleeves and put them in a binder. The sleeves need to be archival and when storing the binders on shelves, they need to be laid down on their sides so that the documents do not sag which can cause damage.
- **Folders:** Some genealogists choose the folder method of archiving genealogical records. Having a file folder for each ancestor that contains only their documents is the method that I use. The folders are then filed in a filing cabinet or in an archival box by surname. Archives use the folder method when compiling their Vertical Files Collection.
- **Boxes:** In the archives, most records collections are archived in file folders and then placed in archival boxes. These collections of records are what make up the Manuscript Collections in an archive.

Whatever method you choose to store your genealogical records, it is important that the records themselves are processed properly and stored properly.

Unfolding and Flattening Records

Once you have come up with the method you will archive your records, it's time to start processing your genealogical records. In the archives, the first step is to unfold and flatten the records.

In the archives we unfold and flatten all documents possible. The act of unfolding and folding documents can cause damage in time at the crease lines. Home archivist should also unfold and flatten their documents whenever possible.

Cleaning Records

Home archivists could find that many of their records are dirty. Records could have become dirty by where they were stored and could have surface dirt or soot on the actual records.

- **Soft Bristle Brushes**: Using soft bristle brushes, like make-up brushes, to sweep away any dirt or debris that is on your records helps to clean records
- **Soot and Dirt Cleaning Sponges**: These sponges can be purchased at any online archival materials store. They are used on documents to remove surface dirt such as soot or other stains. **CAUTION: DO NOT USE ON DOCUMENTS WITH PENCIL WRITING!** The sponge will actually erase all pencil from the page.

Removing Hazards

Documents can have items attached to them that are damaging and a hazard to the life of that document. These items need to be removed carefully:

- **Metal Paper Clips**: Metal will rust and once rusted can damage the documents. To remove metal paper clips, use a piece of plastic Mylar or other plastic film, slide the plastic under the paper clip and then continue moving the plastic off the document until the metal paper clip is completely off the records.
- **Staples**: All staples need to be removed from all documents. There are no exceptions to this rule. Staples are very damaging to documents and should be removed. Do not use a claw staple remover or a wand staple remover. Use a micro spatula to lift each prong and then slip the spatula under the staple and slowly remove it.
- **Straight Pins**: This is one type of metal fastener that is not found as often as staples and metal paper clips. Many offices and individuals did use this form of fastener to fasten papers together. A straight pin could only hold together a few sheets of paper while the staple and metal paper clip could attach a larger stack of papers. To remove straight pins, just pull it out of the document. If the straight pin has rusted to the document, use wire cutters to cut the pin in half and then remove the pieces carefully.
- **Rubber Bands**: Using rubber bands on genealogical records, photographs, a stack of old family letters or any heirlooms is a **NO-NO!** Rubber bands, over time, can be very destructive to records and anything it touches. Removing rubber bands can be a difficult task if they have adhered themselves to the records. The most important thing to remember is to be patient when trying to remove rubber bands.
- **Brittle Rubber Bands**: If the rubber band has dried and stuck to the document, use a micro spatula to gently scrape off the rubber band, being careful not to tear the document.

- **Sticky Rubber Bands**: If the rubber band is soft and sticky, do not try to use any kind of solvents. Again, using a micro spatula, gently scrape off the sticky residue.
- **Tape**: Cellophane tape or transparent tape should not be used on genealogical documents. In the past, this type of tape was used on documents to mend tears and sometimes to attach pages together.
- **Deterioration**: Tape breaks down over time and like rubber bands is susceptible to temperature and humidity. Tape will break down and become very sticky or it will become brittle. Either way, tape can cause damage to documents by sticking to the pages and leaving a yellow stain on the records.
- **Sticky Tape**: If the tape has become very sticky and is sticking to the documents, try using a micro spatula to scrap off the tape. Be careful not to damage the document.
- **Brittle Tape**: If the tape has become dried out and brittle, you might get lucky and the old tape might come right off only leaving a brown stain on the page.

Archival Tape

There is a product that can be purchased from archival supply stores called “Document Repair Tape”. This acid free tape should be used in moderation and only if necessary.

- Place the acid free document repair tape on the reverse side of the document and only along tears that have no writing on them, if possible.
- Use the document repair tape on the reverse side of photographs and never on the actual photograph.
- Use with caution and as little as possible.

Consulting with a Conservator

If you come across metal fasteners, rubber bands, tape or some other damage to your documents that you don't feel comfortable taking care of yourself. Please consider consulting with a professional conservator. Contact your state archives to see if they have a conservator on staff or can direct you to one that does work locally. You can also find conservators at:

American Institute for Conservation of Historic and Artistic Works
<http://www.conservation-us.org/>

Records Storage and Climate Controls

Archives and archivists watch the climate controls in their facilities every day. Humidity and heat is the enemy to any archives and it should be the case for all home archivists. It's true that not everyone can have the perfect climate in their homes for genealogical records but we can try.

- Do not store records in a basement, attic or garage.
- Store records in the coolest part of the house, preferably where the temperature is between 35-65 F°, the colder the better. Be sure the storage area has a steady temperature and does not fluctuate by more than 5 degrees.
- Store records where the humidity is between 30%-50%. Keeping records as close to the 30% humidity is preferred to slow the deterioration rate of documents.
- Keep away from sunlight at all times. Sunlight will fade writing on records and images on photographs.

Take care of our family records and artifacts is as important as researching our ancestors. Protecting and preserving our family records for the next generation will hopefully insure that our ancestors are not forgotten.