# The Historian's Office

## Location

The location of the historian's office is important as it impacts the public's access to you and the information archived there. While some historians offices are located in their home, there are benefits to having your office located in a municipal or public building.

### Consider these points:

♦ Inviting strangers into your home to use your resources can be disruptive and possibly dangerous.

♦ An office in a municipal or public building:
   ♦ Offers a more secure location.
   ♦ Identifies the position as a municipal department.
   ♦ Provides access to a municipal telephone, office equipment, municipal mailing address, and online accessibility.
   ♦ Provides space for displays.
   ♦ Allows you to establish official office hours.

If office space in the Town Hall is not already designated for the historian, consider seeking office space in a peripheral building or your local public library. The resources at a library compliment the resources found in the Historian's office.

**Note:** Wherever your office is located, you should be given a municipal mailing address, email address, and space on the municipal website for your own web page.

## Business Cards

Business cards are important; they identify you and your position.

- Ask the business office what commercial printer the town uses for business cards. You may find they make their own. If so, and you have a program to create them, do so. If not, ask if someone could help you create and print yours.

- Decide how many you will need. If you are using a commercial printer, you may receive a quantity discount for 300 or more. Ask the difference in the cost of printing 300 versus 500. If you are printing them yourself on an office printer, print a smaller quantity and replenish your supply as needed.

**Tip:** Do not print your office hours on the card. If you order 300 cards and you need to change your hours before using all of them, you've wasted money. Instead, print small stickers listing your office hours that you can affix to the back of your card as needed.

## Office Hours:

As an officer of a local government charged with the responsibility for matters relating to your municipality (muni), you need a schedule of business hours when you are available to the public.

Find out how many office hours your municipality (muni) expects you to be available. This typically depends upon the former historian's hours and the salary you are being paid. If you are a full time historian, your hours are normally defined by a regular work week. If you are considered a part time employee, then you can often define a schedule for those hours that works for you and the public you serve.

### Consider these points:

♦ Your muni may need information from you during normal working hours
♦ The public may need access to your files during the day
♦ Mondays and Fridays fit the schedule of travelers seeking genealogical records
♦ Students cannot use your resources while school is in session.
♦ Patrons, presentations, or other events may require you to be available for appointments outside of normal office hours.

Look at the former historian's office hours; do they provide access for these groups, should you continue using this schedule or establish new hours?

Part time is normally defined as 16 or 20 hours per week. By considering the groups needing your information and assistance, you might decide to organize a 16 hour office schedule as in this four day example:

**Monday**—8:00 to 12:00  (muni questions and travelers)
**Tuesday**—2:00 to 6:00  (later hours for students)
**Wednesday**—8:00 to 12:00
**Thursday**—8:00 to 12:00

And by appointment.

Or as in this three day example:
**Tuesday**—2 to 7
**Wednesday**—9 to 2
**Thursday**—8 to 2

And by appointment.

Your hours may also depend on the location of your office. Once you have established a schedule, try not to change it unless absolutely necessary. Post your hours on the muni's web page, or a page of your own, as well as on your office door.

## Office Equipment:

To fulfill your responsibilities, your office should contain at a minimum:
- ♦ A computer with a printer
- ♦ Lockable file cabinets
- ♦ Shelves
- ♦ A desk and chair
- ♦ A phone, preferably with your own number or extension
- ♦ A copier or access to one
- ♦ General office supplies and archival materials
- ♦ An office door that locks.

The ability to lock your office and cabinets is important, you are responsible for the contents and patrons using the materials in your absence can create problems.  Locked cabinets and files prevent items from being taken.

### Other useful equipment includes:
- ♦ A scanner  (for making high-quality scans of photographs)
- ♦ A camera  (for photographing people and events)
- ♦ A digital audio recorder (for oral interviews)
- ♦ A video camera (for video interviews and recording events)

### Computer Programs:
- ♦ Word – for letters, articles, pamphlets, reports.
- ♦ Publisher – for posters, flyers, display labels
- ♦ PowerPoint – for presentations
- ♦ Access – for creating databases of information such as indexes.
- ♦ Excel – for creating budgets or tracking expenses

**Note:**  Technology has become an important tool in today's everyday work world.  If you are not already familiar with using common software programs, it is recommended you work with someone who can teach you how to use them, take a simple introductory class, or take an online class.  While it is possible to "teach yourself", without direction, you may find you're not using the program in the simplest manner.

**Tip:**  Libraries and other organizations sometimes offer an introductory class for free.

**Important Note:**  The photographs and documents you collect and preserve are important to the municipality.  When you store them on the hard drive of your workstation or laptop, they can be lost if it crashes.  By storing them on the municipality's server, they will be backed up regularly providing protection against loss.  Check with your municipality to ask for space to store these pieces of history.

## Organizing Your Office:

A well-organized office will provide easy access for family researchers, students, authors, the media, general public, and You.

Take some time to look through the items in the office to see how they are already organized.

### Ask yourself:

- ♦ Are all documents about a topic kept together?
- ♦ Is information easy to retrieve?
- ♦ Are the best preservation techniques being used?

Once you understand and have worked with the current office organization you can determine whether you should make improvements. If you have been assisting or volunteering with the former historian, you may feel the current office set-up is fine or you may already have ideas for improvement.

While scrap books, general photo albums, and one file per subject will work for very small collections, as the information grows it becomes more time consuming to find what you're looking for. Researchers with limited time to locate the information they need won't have time to page through general collections.

Although the task may seem daunting, by defining a structure and following it, it's much easier to keep the office organized.

Decide on a policy of use for the materials in the office. Will you be the only person allowed to pull files and shelved items or will researchers have access to file cabinets and open shelves? If you allow the public to pull files from the drawers it is recommended you have them use place holders and ask that files be placed on top of the cabinets for re-filing by you or a knowledgeable volunteer. See "Setting Up Basic Office Rules for Patrons" on page 7.

A single organizational pattern for all your information assures fast and easy retrieval and re-filing.

## Subject Files

Develop a list of subject categories.  For example, here are 34 subject categories that can be modified to fit the needs of your office.

| | | |
|---|---|---|
| Agriculture | Fire Department | Organizations / Clubs |
| Archaeology | Government – Town | Parks / Recreation |
| Broome County | Government – NY/US | Police |
| Business / Industry | Hamlets | Religion |
| Cemeteries | Highways / Roads / Bridges | Scouts |
| Census | Land / Property | Sports |
| Disasters | Landmarks | Transportation |
| Education | Libraries | Utilities |
| Emergency Services | Medicine | Town History |
| Environment | Military | Vital Records |
| Ethnic Groups | Miscellaneous | |
| Events | Museum | |

Each category can then be divided into sub and tertiary level categories to provide easy access to large topics:  For example, for the Disasters subject category:

**Disasters**   (primary level)
- Fires   (secondary)
- Flooding (secondary)
  - 1901 Flood  (tertiary)
  - 1936 Flood  (tertiary)
- Storms (secondary)

A good general rule is to create a secondary or tertiary level file when you have five (5) or more items within that subject level.

## Surname or Family Files

Filed alphabetically they contain: newspaper clippings, deeds, genealogical records, vital records information, obituaries, military, and professional information, but **NOT** original photographs.

**Note:**  See Photographs for information on how to file both prints and digital images.

## Photographs

### Places, Events, Objects

Sort both digital and hardcopy photographs of places, events, objects using the same categories as the subject files.

The same hierarchical structure can be used for filing both hardcopy photos in albums or binders and digital photos.  For example, photos about the schools would be filed under the primary subject, Education.

**Education**  (primary subject)
- Buildings  (secondary level subject)
- Class pictures
- Faculty
  - Administration  (tertiary level subject)
  - High School Teachers
  - Elementary Teachers
- Clubs and Organizations  (secondary level subject)
- Sports
  - Baseball
  - Basketball
  - Football
  - Soccer
  - Tennis
  - Track

Using secondary and tertiary categories allows you to easily retrieve photos quickly.    By using the same filing structure for both subject information and photographs, you know exactly where to find the answers to questions.   It also makes it easier and quicker to file newly acquired information and replace information pulled for use.

### People Images

Sort both print and digital images of people into two categories;
- **People Identified**
  Within the People Identified category, file the photos alphabetically by surname.

- **People Unidentified**.

## Shelved Information

Sort shelved information into categories; for example, group:

- Published histories about your muni
- Published histories about the county
- Published histories about the state
- Atlases and Gazetteers
- Documents or binders containing cemetery records
- Published genealogies
- Town reports
- School yearbooks
- Photo albums
- How-to Information
- Etc.

If the collection is large, type an index of all the shelved documents.  An index or numbering system helps you refile books quickly.

### Remember, the objective is always
### Easy Retrieval and Re-filing

## Setting Up Basic Office Rules for Patrons

**Consider:**

- **Will you allow researchers to pull files from your cabinets?**
  **Tip:** Many offices pull the files for patrons.  If you let them pull the files have them use placeholders to aid refilling.

- **Will you allow them to re-file the materials?**
  **Tip:** This is **not advised**, it can be difficult to locate a misfiled folder and you won't find that it's misfiled until you need it.

- **Will you scan or copy items upon request?**
  **Tip:** This is a common service.  It's easier to make the scans or copies rather than allowing patrons, who are unfamiliar with the equipment, to do so.

- **When you scan or copy items, will you charge...and how much?**
  **Tip:** This typically depends on the number of copies requested and your budget.

♦ **What about photographs, will you share them?  Charge for copies?**
**Tip:** Many Historical Societies sell digital images or prints.  Check whether your muni has a policy on charging.

♦ **Before you share photographs; do you have permission to share them or are they copyrighted?**
**Tip:** Photos are automatically copyrighted by the photographer.  You must hold the copyright or have permission from the copyright owner to share copyrighted photos.

**Tip:**  When you have received permission to use or share a photograph, be sure to attribute the photo properly; for example:  *Used with Permission of John Doe* or *Copyright 2010, John Doe.*

♦ **If you have a subscription to Ancestry.com, do you plan to login and allow researchers to do research, or will you do it?**
**Tip:** This would depend on your office set up.  Remember, most libraries have free access to the U.S. only version of Ancestry.com.

♦ **Will you loan books from your collection?**
**Tip:** If you choose to, be sure to have a loan process and stamp the book as coming from your office.

♦ **Do you want to accept genealogies compiled by others?**
**Tip:** If yes, record the name and contact information of the researcher/compiler and remind them it will be shared with other researchers using your files.

♦ **Are you allowed to accept donations from patrons?**
**Tip:** Ask your muni if you can accept donations and how to report them.  Or ask the patron to donate to a non-profit group such as your museum in your name.