

# The Traveling Archivist Program

## *Training Manual*

*Revised*

**2015**



NATIONAL  
ARCHIVES

NATIONAL HISTORICAL  
PUBLICATIONS  
& RECORDS COMMISSION



STATE ARCHIVES  
of NORTH CAROLINA

**North Carolina State Historical Records Advisory Board  
State Archives of North Carolina**

*This training manual is made possible through a grant from the  
National Historical Records and Publications Commission*

# Traveling Archivist Program Training Manual

## *Introduction*

The Traveling Archivist Program (TAP) is the primary outreach service of the State Archives of North Carolina to the state's smaller repositories that hold historical records. The program is unique in that the services are provided on site in an interactive environment and are targeted to the repository's specific needs. These repositories include historical and genealogical societies, local history rooms in public libraries, museums, and institutional repositories in both public (e.g. hospitals) and private (e.g. businesses) enterprises. Historical records include personal papers and manuscripts, photographs, sound and video recordings, scrapbooks and ephemera, and the archives and administrative records of both ongoing and defunct institutions. Together with rare books and published ephemera, these materials are considered to be "special collections" to differentiate them, if the parent institution is a museum or library, from object or three-dimensional collections, or general circulating collections of books, DVDs, CDs, etc.

The Traveling Archivist Program was built upon a foundation of past State Historical Records Advisory Board initiatives to improve the preservation of and access to North Carolina's historical records collected in over 950 cultural repositories throughout the state. Begun in 2009, the TAP, in essence, is a field service program designed to send trained professional archivists to repositories that have requested assistance in managing their special collections. Centered on a site visit to the applicant and a survey of their collections, the goal is always to provide repository managers with practical and affordable recommendations they can undertake to improve collection preservation and access. Site visits are sometimes followed up with a re-visit, often focused on the implementation of a specific recommendation made by the Traveling Archivist in his or her Site Visit Report. Revisits allow the Traveling Archivist to stay engaged with repository staff to help them get started on work designed to accomplish specific goals. For example: improving storage by re-housing materials in acid free enclosures, writing an institutional collection policy, implementing acquisition systems based on comprehensive deeds of gift, or starting a project to arrange and describe important holdings.

To help direct the work of those serving as Traveling Archivists, a set of guidelines and accompanying forms have been developed and effectively used since the program's inception. These are now brought together in this Training Manual to guide those archivists recruited to work in the field, and to standardize their efforts based on their predecessors experience and the development of best practices. The Training Manual will, hopefully, not remain static. It should be modified and improved over time as more archivists journey into the field and bring their professional expertise to bear on the issues they encounter during site visits.

The Traveling Archivist Program is administered through the State Archives of North Carolina. Program support has come from both the federal government through grants from the National Historical Publications and Records Commission, and state government funding through the North Carolina Department of Cultural Resources.

—Hal Keiner

—Dick Lankford

# ***TAP Training Manual***

## **Contents**

<b>Section 1</b>	<b>Introduction to the TAP process.....</b>	<b>4-26</b>
<b>Section 2</b>	<b>Reporting .....</b>	<b>27-41</b>
<b>Section 3</b>	<b>Teaching Tools &amp; Resources .....</b>	<b>42-77</b>

**North Carolina State Historical Records Advisory Board  
2015**

***TAP Training Manual***  
***Section 1: Introduction to the TAP Process***

## GUIDELINES FOR APPLYING TO THE TRAVELING ARCHIVIST PROGRAM

**Introduction:** Thank you for taking the time to complete the application for the Traveling Archivist Program, an initiative of the State Archives of North Carolina to improve preservation of and access to archival collections. [Access the application online.](#)

The purpose of TAP is to encourage best practices in the preservation of and access to special collections (rare books, manuscripts, archival records, photographs, oral histories, scrapbooks, newspapers, and ephemera) held in North Carolina repositories. Repositories include historical and genealogical societies; public libraries; the archives of colleges, hospitals, and other organizations; historic houses and sites, museums; and other publically-accessible institutions that hold archival materials documenting the state's history and culture.

Your completed application will help us determine the type of assistance we deliver to your institution during a site visit. TAP site visits will be built around a physical survey of your collections to assess both preservation needs (storage conditions, security, environmental controls), and access tools (finding aids, inventories, indexes, or catalog records, etc.). During the survey, discussions with and input from the staff will help inform recommendations for improving collection preservation and access. These recommendations will be formalized in a written report provided to you.

**Eligibility:** All North Carolina institutions that hold archival records documenting North Carolina history and culture and whose collections are accessible to the public may apply; however, priority will be given to smaller institutions with limited resources to care for and manage their collections. Geographical location within North Carolina will be considered to ensure that repositories in all regions participate. The size and scope of the collections, their condition, specific requests for assistance, and the availability of institutional resources will be considered in the evaluation of all applications. **TAP is not designed to provide assistance for institutions that house primarily objects or artifacts.** *Institutions selected for site visits from the Traveling Archivist must agree to complete a follow-up evaluation intended to measure the effectiveness of the program and agree to help promote the work of the TAP.*

**How to Apply:** Online applications are preferred. Online applications must be received by **5:00 p.m., September 26, 2014.** Please type "TAP Application" in the subject line and email to:

Andrea Gabriel, [andrea.gabriel@ncdcr.gov](mailto:andrea.gabriel@ncdcr.gov)

Paper copies will be accepted if they are postmarked no later than **5:00 p.m., September 26, 2014** and mailed to:

Andrea Gabriel  
State Archives of North Carolina  
4614 Mail Service Center  
Raleigh, NC 26699-4614

Questions relating to the application may be addressed to:  
Andrea Gabriel  
919.807.7326; Monday—Friday, 8:00 a.m. to 5:00 p.m.

Date of this application: (mm/dd/yyyy)\_\_\_\_\_

# STATE ARCHIVES OF NORTH CAROLINA

## Traveling Archivist Program (TAP)

### Application for Assistance

#### *I. INSTITUTIONAL INFORMATION*

1. Name of Institution:

If part of a larger institution, please list parent organization:

Your Name:

Your Title:

Your E-mail address:

Your Telephone:

Institutional Mailing Address:

Street Address (If different than mailing address): \_\_\_\_\_

City:

Zip:

E-mail:

Telephone:

Fax:

Institutional Website:

County:

U.S. Congressional District:

2. Have you received a TAP visit before? \_\_\_Yes \_\_\_No If yes, what date? (mm/ dd/yyyy\_\_\_\_\_)
3. Have you had consulting services before or have you received assistance from any organization or state/local agency before? \_\_\_Yes \_\_\_No If yes, describe those services and date delivered (e.g. survey; consultation)

4. Primary Type of Institution (Check only one):

\_\_\_ Archives; \_\_\_ Library; \_\_\_ Historical Society; \_\_\_ Genealogical Society; \_\_\_ Historic Site/House;  
\_\_\_ Museum; \_\_\_ Other; please describe \_\_\_\_\_

**PLEASE NOTE: EACH OF THE FOLLOWING QUESTIONS REFERS SOLELY TO THE ARCHIVAL COLLECTION FOR WHICH YOU ARE REQUESTING ASSISTANCE. AS EXAMPLES, IF YOU NEED ASSISTANCE WITH A LOCAL HISTORY COLLECTION THAT IS PART OF A LIBRARY'S HOLDINGS, ADDRESS ONLY THAT COLLECTION, OR IF YOU HAVE ARCHIVAL RECORDS AS PART OF A MUSEUM COLLECTION, ADDRESS ONLY THE ARCHIVAL COLLECTION.**

5. In the space below, please describe the nature of your collection (s) (*LIMIT 150 WORDS*) addressing:

- *how it came into existence;*
- *ways the collection is promoted to and accessed by the public;*
- *the significance of this collection to North Carolina history and culture.*

6. Staff dedicated to this collection:

\_\_\_ All volunteer run organization; \_\_\_ 1 or fewer paid staff; \_\_\_ 2-5 paid staff; \_\_\_ Over 5 paid staff

7. Number of volunteers, interns, etc. in addition to paid staff who work specifically on this collection: \_\_\_

8. Square footage of storage space dedicated for this collection: \_\_\_\_\_

9. Square footage of public services space available for this collection: \_\_\_\_\_

10. Is this archival collection accessible to the public? \_\_\_ yes \_\_\_ no

11. Number of people who access and use this collection annually (onsite): \_\_\_\_\_

12. Operating hours and days that this collection is open to the public: (for example, M-F; 8:00 a.m.--1:00 p.m. or "by appointment only", etc.) \_\_\_\_\_

13. What is your annual budget for the management and care of the archival collection? \_\_\_\_\_

14. Source(s) of funding for this collection: (Please check all that apply)

- Federal appropriation
- State appropriation
- Local appropriation
- Private funding (bequests, etc.)
- Admissions fees
- Other (please describe)

15. Do you currently receive any grant monies (private, federal, or state) to operate this collection?

Y  N If yes, please list and describe:

16. What guidelines and policies do you have for the management of your collections and operations? (For example, administrative articles of incorporation, accessions, collections management, or reference policies.)

## ***II. COLLECTIONS INFORMATION***

17. Type of material included in this collection: (Please check all that apply)

- Personal papers, diaries, ledgers, correspondence or letters
- Photographic prints/negatives/slides
- Scrapbooks
- Maps
- Microfilm/fiche
- Drawings/2-dimensional works of art
- Architectural drawings
- Image recordings: \_\_\_\_\_ list media formats (e.g. film, video tapes)
- Sound recordings: \_\_\_\_\_ list media formats (e.g. cassette tapes, albums)
- Magnetic storage tapes
- CDs or other computer media
- Electronic or Digital Materials
- Administrative Records
- Rare books
- Other; please describe \_\_\_\_\_



18. What is the volume of your archival holdings? (e.g. number of cubic feet or ; number of manuscript boxes; indicate only one) \_\_\_\_\_ cu. feet or \_\_\_\_\_ (number of boxes)
19. Is this collection protected by climate and environmental controls? \_\_\_\_\_ Y \_\_\_\_\_ N
20. What percentage of this collection is arranged and described or cataloged? \_\_\_\_\_%
21. What percentage of this collection has finding aids/inventory lists or other finding tools? \_\_\_\_\_%
22. What percentage of this collection is accessible online? \_\_\_\_\_%
23. What percentage of this collection needs immediate preservation/conservation action? \_\_\_\_\_%
24. Using the list below, with 1 being the most important, and 6 being the least important, please prioritize the topics for which you would like assistance. Do not use a number more than once.

- \_\_\_\_\_ Accessions and acquisitions
- \_\_\_\_\_ Disaster preparedness
- \_\_\_\_\_ General care of collections (handling, storage)
- \_\_\_\_\_ Collection access (preparation of finding aids/cataloging)
- \_\_\_\_\_ Preservation/Conservation
- \_\_\_\_\_ Education/Training

25. If the above selections do not represent your most pressing need, please describe your first priority relating to the care and management of this collection:

26. Where is the archival collection housed?

27. How and by whom is the archival collection used?

28. How do you promote the collections and accessibility to the public? (i.e., how do people know about your collections?)

29. Do you use this collection for public programs? \_\_\_\_\_ Y \_\_\_\_\_ N  
If yes, please describe (e.g. lectures, workshops, special events, teaching tools, etc.)

30. How would you assess the physical condition of this collection?

Good  Fair  Poor  Very Poor

31. What is one measurable objective you will achieve with TAP assistance? (limit 100 words)

## TAP APPLICATION EVALUATION FORM

1. Name of Institution:
2. Parent affiliation:
3. County:
4. Is the application filled out correctly and completely? \_\_\_ Yes \_\_\_ No
5. Does this application require a follow-up contact for clarification? \_\_\_ Yes \_\_\_ No
6. List the top 3 priorities of assistance requested by this institution

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

7. Significance of areas in relation to other NC collections (summarize)

8. Extent of public access (summarize)

9. Size of staff: \_\_\_ Volunteer or 1 and fewer \_\_\_ 2-5 staff \_\_\_ 5 staff or more

10. Funding support (summarize)

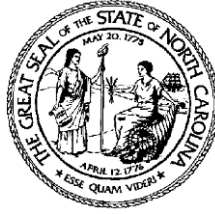
11. Percentage of collections arranged/described/cataloged:

12. Condition of the collection(s): \_\_\_ Good \_\_\_ Fair \_\_\_ Poor \_\_\_ Very Poor

13. Does this institution meet the TAP requirements **and** would it benefit from a consultation from the project archivist? \_\_\_ Yes \_\_\_ No

Recommend for funding? \_\_\_ Yes \_\_\_ Yes with conditions \_\_\_ No

Comments:



North Carolina Department of Cultural Resources

Pat McCrory, Governor

Susan W. Kluttz, Secretary

October 15, 2014



Dear Ms. [REDACTED]

Thank you for your application to the Traveling Archivist Program (TAP). I am happy to inform you that your institution was selected for inclusion in TAP.

Dick Lankford, project archivist, will be contacting you by telephone in the coming weeks to gather some basic information and schedule your site visit.

Congratulations and welcome to the program.

Sincerely,

Andrea Gabriel  
State Archives of North Carolina

MAILING ADDRESS:  
4601 Mail Service Center  
Raleigh, NC 27699-4601

(919) 807-7385 (919) 733-1620 Fax  
www.ncculture.com

LOCATION:  
109 East Jones St.  
Raleigh, NC



## North Carolina Department of Cultural Resources

Pat McCrory, Governor

Susan W. Kluttz, Secretary

October 9, 2014



Dear Ms. [REDACTED]

Thank you for your application to the Traveling Archivist Program (TAP), a project of the North Carolina State Archives.

After careful review of all applicants, your institution was not selected at this time for consultation because our records show that a site visit was conducted at [REDACTED] by Dr. Hal Keiner in June, 2012. For your information a copy of Dr. Keiner's report is attached.

The focus of TAP is on the preservation of and access to records, documents, and other archival materials. The program does not specifically address museum artifact and object management issues in Past Perfect software. The review committee felt that your application reflected the need for consultation about managing and caring for museum objects more so than archival materials.

The TAP is an ongoing program with applications sought in the fall and spring. There are TAP revisits that require demonstration of progress from the initial TAP recommendations. You may apply at a later date for a TAP revisit with the application crafted toward the need of assistance for the archival items you do have. In the meantime, you might consult with [REDACTED] [REDACTED] is extremely knowledgeable about archive preservation practices and techniques

Sincerely,

Andrea Gabriel  
Outreach and Development Coordinator

## TAP Pre-Visit Institutional Questionnaire

This questionnaire will help us plan the Traveling Archivist’s visit to your institution. We hope to meet your expectations for participation in this program by providing information and resources tailored to your needs. Please complete and return by email to Dr. Keiner: ([keinerhc@appstate.edu](mailto:keinerhc@appstate.edu)).

### Contact Information

Name of Institution:

Your Name and Title:

Mailing Address:

Street Address (If different than mailing address):

City:

County:

Zip:

Telephone:

Email:

### Site Visit Structure

All Traveling Archivist Site Visits begin with a survey of your collections. You will be asked to guide Dr. Keiner through ALL your exhibition and storage areas holding Special Collections (records, documents, photographs, rare books, ephemera, and audio-visual material). The purpose of the survey is to familiarize Dr. Keiner with the scope and content of your Special Collections and to assess their condition and storage environment.

Please designate specific types of materials that you want the Traveling Archivist to inspect:

Paper documents/Historical records \_\_\_ Photographs \_\_\_ Ephemera (broadsides, posters, trade cards, etc.) \_\_\_ Architectural drawings \_\_\_ Film, video tapes or DVDs \_\_\_ Audio tapes or CDs \_\_\_  
Rare books \_\_\_ Scrapbooks \_\_\_ Reference Files (published and unpublished content) \_\_\_  
Other \_\_\_ (please specify)

Next, Dr. Keiner will review your information infrastructure, that is, the written documents that control your institution's functions, paying particular attention to policies and procedures establishing ACCESS to your collections: collection policy, donor records, accession records, and finding aids. He will also look over other components of your information infrastructure on your request. Please list all specific documents below that would like to discuss.

Mission Statement \_\_\_ Collection Policy \_\_\_ Preservation \_\_\_ Disaster Plan \_\_\_

Donor Records \_\_\_ Accession Records \_\_\_ Collection Finding Aids \_\_\_

Electronic Cataloging/Software \_\_\_ Digitization Standards, Procedures, and Files \_\_\_

Reference Room Policies and Procedures (rules, user registration, copying) \_\_\_

Public Relations (press releases, newsletters) \_\_\_ Public Programming (special events, meetings) \_\_\_

Grant Writing Procedures \_\_\_

### **Needs and Expectations:**

Please note that all site visit activities will be informal and conversational. Their purpose is to allow the Traveling Archivist to become knowledgeable about your institution, your holdings, and your challenges. Following these reviews, Dr. Keiner will discuss with you specific steps you can take to improve the preservation of your special collections and to make their historical content available for research. From this conversation Dr. Keiner will develop a series of recommendations that will be presented in his formal, written report sent to you about three weeks after the site visit. To facilitate discussions during the visit, please answer the two questions that follow.

1. Please suggest other ways that your site visit may be structured to provide the information and assistance you need to care for and provide access to your collections. Are there specific topics that you want addressed?

2. In your own words, please describe the main problems and challenges facing the management of your institution and its collections. Please be candid. This information will be kept confidential and your comments used only to plan his activities with you.

*Thank you for your time and attention. As a participant in the Traveling Archivist Program, you will be asked to complete a follow-up questionnaire to help us evaluate the program's strengths and weaknesses.*

*We appreciate your cooperation.*



# Site Visit Report Guidelines

Site visit reports are written upon completion of the site visit and meetings with the staff. These reports are shared with the institution, acknowledge the current state of the collections, environmental controls, strength of institutional infrastructures, and public access and contain no cost/low cost recommendations for improvement in addition to longer-term strategies for collection, preservation, and access improvements.

The areas below will help guide the development of the site visit report. A copy of the report should be mailed to the institution and the State Archives.

## BACKGROUND INFORMATION

### Contact Information

- Name of institution:
- Type of institution, i.e. public library, community college archives,
- Primary Contact (name and title):
- Mailing Address:
- E-Mail:
- Telephone:
- Website:

### Institutional Description

- Outline the history of the institution. When was it established? Why? What major collections does it hold? How and when were they acquired?
- What is the institution's mission? Include a copy of the mission statement.
- How many people work for the institution? (FTE = full-time equivalent)  
\_\_\_\_ FTE Professionals \_\_\_\_ FTE Support Staff \_\_\_\_ Student assistants or interns, representing  
\_\_\_\_ FTE \_\_\_\_ Volunteers, representing \_\_\_\_ FTE
- What is the institution's overall budget for all its activities?
- Does the institution have a long-range strategic plan? Include copies of relevant sections that address collection management, acquisitions, preservation, and exhibitions.
- List the five most important collections of materials held by the institution (largest, most unique, most heavily used, greatest research value, etc.); provide a short description of contents, and some measure of extent (number of volumes, linear feet, number of items, cubic feet).

## REPORT CONTENT

### 3. Site Visit Specifics

- Date of visit

- Location and areas surveyed (administrative office, reading room, storage rooms and vaults, work room, conservation lab, other)
- Name and title of staff met with during visit

#### 4. Preservation

- Describe the “bricks and mortar” aspects the institution: Size, layout, overall construction, HVAC, general condition, etc.
- Describe the collection storage areas; public areas; and staff areas. Where are they located, are areas well integrated, are there glaring problems?
- What types of storage furniture (i.e. open shelving, map files, file cabinets, etc.) are in use? Describe construction and condition.
- Describe the use of archival-standard enclosures (boxes, folders, etc.).
- Describe the storage areas addressing cooling and heating, humidity control, regular monitoring and recoding of temperature and humidity.
- Comment on special issues such as oversized materials, objects, photographs, artwork, audio/visual, architectural drawings/blueprints, artwork, books, scrapbooks, microfilm, electronic storage media.
- Describe reformatting activities. Does the institution use photocopying, microfilming or digital imaging as a preservation tool (e.g. to produce hard copy or digital surrogates of fragile documents and photos)?
- Describe the institution’s security arrangements. Is the perimeter secure (doors, windows, etc)? Is there an alarm system? Are the collections stored “under lock and key,” and is access limited to authorized staff? Is staff trained in security procedures? Are written security policies and procedures available?
- Is there a written disaster plan? Does the institution regularly test plans and make improvements? If the institution does not have a formal disaster plan, describe tools in place to address emergencies (such as calling trees, posted emergency numbers, disaster supplies in storage, etc.). Are new employees instructed in emergency and disaster response procedures?
- Recommendations for improving preservation and storage (furniture, enclosures, handling, etc.)

#### 5. Access

- Describe overall access policies. Are policies and procedures written and collected in a manual? Is staff trained to understand and implement policies and procedures?
- Is there a collection policy? Is it adhered to? Is the collection policy in line with the institution’s mission statement? Provide a copy.
- Describe the policies and procedures for acquiring collections. Are collections formally accessioned? Are preliminary inventories for collections created? Is a number applied to each accession? If there an accession log or register? Does the register track the progress of the collection from acquisition through processing? Is there a registrar?

- Describe the overall processing program. Does it adhere to SAA/SNCA best practices? Are finding aids linked to a library catalog through a MARC record? Are finding aids marked up in EAD? Are written finding aids available for researchers either in hard in hard or electronic copies?
- Describe public spaces such as Reading Rooms where collections are used. Are lockers available for researchers' belongings?
- Are written reference procedures in place and adhered to? Do researchers register and show ID? Are rules and procedures in place for handling collections, and for copying, scanning, and other forms of reproduction?
- Does the institution use computers? For what purposes (membership/mailings and fundraising; administrative matters such as correspondence, reports and budgets; collection management; reference)? Does the institution use a collection management system (Past Perfect, ContentDM, etc.) to organize finding aids and track preservation activities?
- How do users discover the institution's holdings? Does the institution have a web site? What is the address? Is there a public interface allowing researchers to access records in the Collection Management system? Describe other uses of web site (news, advertising, directions, shopping, etc.)
- Provide recommendations for improving access and collection management

## **6. Outcomes**

- Sum up the most critical issues as defined by the institution's managers and staff, and the Traveling Archivist.
- What practical improvements can be made in the next six months to address these issues? What are some no cost/low cost solutions that can be undertaken by the institution?
- What long-term solutions should be proposed for discussion by the institution's stakeholders?

## Suggested Items for the TAP Supply Kit

- Gaylord Archival Supplies Catalog
- *A Manual of Basic Archival Practices* (aka the Turi manual)
- 1 2 ½ inch Hollinger document box
- Five acid free, letter-sized folders with 1 inch tabs
- One 8 x 10 inch acid free envelope with flap
- One 3 x 5 inch acid free envelope with thumb notch
- Acid free folder labels
- Acid free Hollinger box labels
- One Mylar L-sleeve to accommodate an 8 x 10 inch photograph
- One Mylar envelope with flap to accommodate a postcard

For repositories requesting a workshop on Arrangement and Description: one DVD copy of *The Basics of Archives*, the AASLH/COSHR training course.

For repositories requesting a workshop on Preservation: one portable, battery powered hygrometer; and a bone folder.

## Site Visit Evaluation

Thank you for participating in the Traveling Archivist Program. We hope your site visit was productive. Please take a few minutes to answer the questions below. Your answers will help us evaluate the effectiveness of this program for continuation and expansion.

Name of Institution:

Your Name and Title:

Date of the Traveling Archivist's visit:

### QUESTIONS:

1. How well was the Traveling Archivist's visit organized?

Very Well \_\_\_\_\_      OK \_\_\_\_\_      Could Be Improved \_\_\_\_\_

Comments:

2. Overall, how well did the visit meet your expectations as defined by the program announcement, the application, and the site visit questionnaire?

Very Well \_\_\_\_\_      OK \_\_\_\_\_      Did not meet Expectations \_\_\_\_\_

Comments:

3. Did the Traveling Archivist conduct a survey of your institution?

a. Yes \_\_\_\_\_      No \_\_\_\_\_

4. Did the Traveling Archivist provide you with relevant and useful suggestions concerning the preservation and management of your collections?

Very useful \_\_\_\_\_

Moderately Useful \_\_\_\_\_

Not Useful \_\_\_\_\_

Comments:

5. If the Traveling Archivist conducted a workshop at your institution, assess the value to you and your staff of the information presented.

Very Useful \_\_\_\_\_

Moderately Useful \_\_\_\_\_

Not Useful \_\_\_\_\_

Comments:

6. What specific information, practices, and resources did the Traveling Archivist suggest or demonstrate to improve the overall preservation and access to your institution's collections?

7. Describe how your institution will incorporate the information, recommendations, and resources provided by the Traveling Archivist Program. Please be specific.

8. How do you and your staff stay informed about new archival practices and products?

9. Please describe your experience with the Traveling Archivist Program. Include any improvements you would make to the application process, the survey, the site visits, and supplies and resources.

10. Please rate your overall experience with the Traveling Archivist Program.

Very Satisfactory\_\_\_\_\_

Moderately Satisfactory\_\_\_\_\_

Unsatisfactory\_\_\_\_\_

## APPLICATION AND GUIDELINES FOR APPLYING TO THE TAP REVISIT PROGRAM

***THIS APPLICATION IS OPEN ONLY TO INSTITUTIONS WHO RECEIVED ASSISTANCE  
DURING PREVIOUS CYCLES OF THE TRAVELING ARCHIVIST PROGRAM***

### **Purpose:**

The TAP (Traveling Archivist Program) Revisit Program provides an opportunity for institutions that have previously benefitted from the TAP to concentrate on one area for continued improvement or to initiate and implement a special project based upon the site visit recommendations. Does your historical society need to assess the condition of the collections? Do staff and volunteers need additional training in preparing finding aids or catalog records? Does your institution need help with writing a collection policy? Does your library need help in completing a disaster preparedness plan?

The TAP Revisit program provides another site visit to help your organization and staff implement recommendations provided in your original TAP site visit report. If your institution is selected to participate, Dr. Keiner will design a "revisit" tailored specifically to address the issues you identify. Additional preservation supplies may be provided.

### **Eligibility:**

This application is open only to those institutions who received previous TAP visits in 2009-2010. **Institutions selected to participate in this program must complete a follow-up evaluation documenting the ways in which the services and activities of the Revisit program improved collection care and management.**

### **How to Apply:**

**Online applications are preferred.** Online applications must be received by **5:00 p.m., June 30, 2011** and may be e-mailed to:

Dr. Harry C. Keiner  
[keinerhc@appstate.edu](mailto:keinerhc@appstate.edu)

Please type "**TAP Revisit**" in the subject line.

Paper copies will be accepted if they are postmarked no later than **5:00 p.m., June 30, 2011**. Paper copies of the application may be mailed to:

Dr. Harry C. Keiner  
100 Botany Dr.  
Asheville, NC 28805

Questions relating to the TAP REVISIT application may be addressed to Andrea Gabriel, North Carolina State Archives, 919.807.7326, Monday—Friday, 8:00 a.m. to 5:00 p.m.



**TAP REVISIT APPLICATION**

**1. Name of Institution:**

If part of a larger institution, please list parent organization:

Your Name (Print):

Your Title:

Mailing Address:

Street Address (If different than mailing address):

City:

County:

Zip:

E-mail:

Telephone:

Fax:

Web site:

Congressional District:

**2. Primary Type of Institution (Check only one):**

Archives;  Library;  Historical Society;  Genealogical Society;  Historic Site/House;  
 Museum;  Other; please describe

**3. Please list date of first TAP visit:** \_\_\_\_\_

**4. What services were provided to your institution during the TAP visit?**

**5. Please describe how you have used the recommendations from the TAP visit to improve preservation of and access to your collections. Include any public awareness and outreach opportunities and tools you have used to promote your collections.**

**6. On which specific recommendation in your site visit report would you like to concentrate?  
Check One:**

- Organizing a collection survey and inventory
- Establishing accession policies and procedures
- Improving and reorganizing storage rooms (shelving, environmental controls)
- Basic conservation for collections (cleaning, foldering, boxing)
- Implementing project for basic scrapbook conservation and access
- Workshop for staff on preservation best practices
- Workshop for staff on access best practices (cataloging and writing finding aids)
- Other (state briefly):

**7. Based on your choice above, please describe the type of assistance you need and list specific projects you would like to implement with the assistance of the Traveling Archivist.**

**8. If your project requires supplies to implement, such as record center cartons, Hollinger boxes, acid free folders, interleaving paper, Mylar photo sleeves, etc., please supply a list below with approximate amounts. The Traveling Archivist will endeavor to provide some supplies to get projects underway, but probably cannot furnish all you will need.**

***TAP Training Manual***  
***Section 2: Reporting***

# The Traveling Archivist Program: Site Visit Report

Name of Institution: Yadkin County Public Library

Primary Contact: Malinda Sells

Mailing Address: PO Box 607

Telephone: 336.679.8792

Email contact: msells@nwrl.org

Date of Visit: September 20, 2010

Conducted by: Harry Keiner, Ph.D., Consulting Archivist & Historian

Principal staff contacted:

Malinda Sells, Branch Librarian

## 1. Introduction

The Yadkin County Public Library is a member of the Northwest Regional Library system serving Allegheny, Stokes, Surry, and Yadkin Counties. The system includes 13 public libraries in the four counties, which have retained their rural character.

The Yadkin County Public Library opened in 1946, and joined the Northwestern Regional Library in 1962. In 1971, a new library was constructed, opening its doors on November 30, 1971. The Library includes the Paul Price Davis History & Genealogy Room at the front of the building where the special collections are housed.

## 2. Special Collections

The YCPL holds significant collections for the study of local history and genealogy. The reference collection of published books includes 1,200 titles, mainly family histories, county histories, histories of local organizations and institutions, and North Carolina history. Other bound volumes and microfilm cover regional census records, cemetery records, marriage records, will and deed abstracts, and Revolutionary War and Civil War rosters. The principal unpublished collections include:

- Vertical files of genealogical material, organized by family name. The files include 950 families and reference over 4,000 individuals. The files mainly contain copies of newspaper articles and research notes, but also contain manuscript material, photographs, and ephemera.
- Microfilm copies of the local newspaper, *The Yadkin Ripple*, 1893 – 1988, supplemented by hard copies of the paper for last 22 years. A broken set of hard copies for a second newspaper, *The Enterprise*, dating from the 1980s and 90s is also maintained.

- Vertical files of local history materials are maintained, organized by subject: church histories, businesses, clubs, and schools. The files are supplemented by a set of scrapbooks.
- Several filing cabinets of research files from the estate of Frances Casstevens, a noted local author and researcher.
- 65 bound volumes of county court and tax records, 1868 – 1963, transferred to the library by the county clerk.

### 3. Preservation

The collection is stored in the Davis History & Genealogy Room on shelves and in filing cabinets. The room is very crowded because it also serves as the research reading room and as the work room for processing collections. In general, the HVAC system seems adequate, maintaining steady levels of temperature and humidity.

### 4. Access

Access to the collections varies. The genealogical materials maintained in the vertical files are accessible through a finding aid that cross references names found in related family records. On the other hand, the Casstevens gift remains unprocessed.

Access to the collections is also negatively impacted by the obvious lack of resources, both staff and money, available to maintain Davis Room and manage its collections.

### 5. Recommendations

- Simplified finding aids, following the Best Practices recommended in the *A Basic Manual*, should be prepared for all unprocessed manuscript materials, beginning with the Frances Casstevens collections. At the same time, work maintaining the genealogical vertical files and its finding aid should also go forward by adding copies of newspaper obituaries and other materials as they arrive.
- To implement the above recommendation, a small group of interested volunteers should be recruited and trained to work in the Davis Room. The lack of staff at the library is an impediment that will not be overcome in the near term. The manager of the branch has provided excellent leadership in keeping the room available to researchers, but without assistance, it is difficult to stay current with all the tasks of maintaining the library's special collections.
- The scrapbook collection should be evaluated and the older and more fragile scrapbooks should be interleaved with acid free paper, tied, and boxed to enhance their preservation.

- Because space is at a premium in the Davis Room, a concerted effort should be made to clean up the space and remove anything not related to the special collections. De-accessioning certain materials, such as periodicals available on-line, should be considered; and the overall layout of shelving and furniture should be evaluated for possible improvement to maximize efficiency.
- The obsolete county records held by the library should be investigated with the help of the county clerk to establish, first, their status as public records and the legality of their transfer; and second, to understand how these records relate to the holdings in the county courthouse. These materials are valuable and should be maintained, but it would be useful to establish who is responsible for their ongoing preservation.

# The Traveling Archivist Program: Revisit Report

Name of Institution: Yadkin County Public Library  
Primary Contact: Malinda Sells  
Mailing Address: PO Box 607, Yadkinville, NC 27005  
Telephone: 336.679.8792                      Email contact: msells@nwrl.org  
Date of Visit: November 10, 2011  
Conducted by: Harry Keiner, Ph.D., Consulting Archivist & Historian

Principal staff contacted:

Malinda Sells, Branch Librarian  
Christy Ellington, Assistant Librarian  
Local History and Genealogy volunteers

## 1. Introduction

The Traveling Archivist first visited the Yadkin County Public Library on September 20, 2010. A survey was carried out focusing on preservation and access to the collections. A follow-up report made a number of recommendations to improve collection management; and, over the course of the year, Malinda Sells, the Branch Librarian, initiated a number of projects based on the Traveling Archivist's suggestions. Malinda oversaw the removal of old supplies, furniture, and materials not relevant to the purposes of the Local History and Genealogy room, allowing for the more efficient use of the space. She also recruited and trained a small group of volunteers to keep the reference files up to date, and to begin the work of making the Frances Casstevens collection accessible. This latter project is an important one. Casstevens was a local historian, author, and genealogist who amassed a large collection of files in the course of researching her numerous books. In the spring of 2011, the Library successfully applied to the Traveling Archivist for a revisit that was conducted on October 25.

## 2. Purpose

The library's revisit application requested that the Traveling archivist return to teach a workshop on archival cataloging and the preparation of written finding aids. To support several proposed processing projects, the library requested Hollinger boxes and interleaving paper. I also anticipated meeting with Ms. Sells to see and discuss the current state of the Library's special collections.

## 3. Work Accomplished

The Traveling Archivist arrived in Yadkinville at 10:30. The first order of business was to unload the large box containing 20 legal-sized Hollinger boxes, a gift of the NC Archives Friends to the Yadkin County Public Library. I had intended to also bring several packages of interleaving paper, but these are on back order from the supplier and will be delivered at a later date. I met with Malinda Sells for an hour, was introduced to her staff, and had a chance to see the improvements made to the Paul Price Davis History & Genealogy Room.

After lunch, we gathered in the Davis Room and I conducted a workshop on archival processing. I concentrated on writing finding aids and handed out a sample prepared by Matt Turi for use in the Boot Camp workshops. This is a good example of a modern collection guide, with all sections clearly reflecting current professional best practices. I spent considerable time on the prose parts: the biographical note, the scope and content note, the arrangement note, and the series descriptions. We also discussed all the work encountered while processing a collection: removing fasteners and re-folding; reformatting newspaper clippings; removing photographs for proper storage and replacing the images with copies (linked by “see also” forms to the originals); and arranging and labeling folders consistently. I tried to demonstrate the flexibility of finding aids and the means of encoding them for presentation on the web and/or inclusion in the online catalog.

#### 4. Recommendations

- Librarians and volunteers working with local history and genealogy collections should seek further training in collection management through workshops and on-line tutorials when possible. To further this end, I left a copy of the AASLH CD *The Basics of Archives*.
- It is important that administrators begin to investigate the possibility of expanding the space now available in the Davis Room. All local history areas need space for three purposes: admin/collection accessioning and cataloging, reference and research, and collection storage. The least expensive option would be to find space for collection storage adjacent to the Davis room, allowing for the reading room and work room functions to expand.
- It is important to remember that the digitization of records is the LAST step in the process of providing patron access. It is important to arrange and describe collections first so that the organization of all materials is firmly established. This will eliminate the necessity for re-scanning materials found to be out of order, or “cutting and pasting” electronic files and documents.

Note: I delivered the interleaving paper to the Yadkin County Pl on January 23, 2012.



# **The Traveling Archivist Program**

## **A Report to The North Carolina State Historical Records Advisory Board**

Harry Keiner, Ph.D.  
Consulting Archivist & Historian

September 13, 2010

### Summary:

The Traveling Archivist Program was developed as an activity to implement Goal 2 of the 2006 SHRAB Strategic Plan. That goal called for the establishment of a Field Services office within the North Carolina State Archives. TAP was related to both past and ongoing initiatives to improve preservation and access to Special Collections in the state's smaller repositories. The program, funded by an NHPRC SNAP grant, paid for a recently retired professional archivist to visit 42 museums, small colleges, local history rooms in public libraries, and historical societies. At these sites, the Traveling Archivist conducted surveys of the repository's holdings, paying particular attention to preservation activities and means of access through written finding aids. The TA also delivered small kits of supplies including acid free boxes and folders, and taught half-day workshops on preservation or access if requested. The visits were followed up with the delivery of a written report making specific, practical recommendations

for improvements in these two areas. The TAP has proven to be an excellent first step. It has validated the field service model as the best means of delivering professional expertise and advice to smaller repositories. It is hoped that the program will continue to evolve into a fully funded Field Service office that engages and provides ongoing material and intellectual support to smaller repositories across the state.

#### Background:

The Traveling Archivist Program grew out of discussions at the SHRAB retreat held to amend and update the board's Strategic Plan in 2006. Out of those deliberations consensus was reached on two goals for the Board to pursue in the following three years.

The first was to raise the level of Disaster Preparedness throughout North Carolina. This goal was accomplished through a statewide conference that brought together stakeholders with an interest in protecting cultural institutions and their collections from the effects of fire, windstorm, and flood; followed by a series of workshops around the state that introduced the concepts of disaster planning and response, and basics of preparing disaster plans.

The second goal was develop activities that would lead to the establishment of a Field Services office at the State Archives. This office would coordinate outreach efforts to improve preservation and access to historical records, with particular emphasis on the Special Collections held in the state's smaller repositories. The Traveling Archivist Program (TAP) was the first activity designed to implement this strategy.

#### The SHRAB and the TAP:

Members of the SHRAB, both current and former, understand that the preservation of historical records in North Carolina involves hundreds of institutions and thousands of individuals. The state is blessed with large public and private organizations that collect, preserve, manage, and make available to the public a wide range of documentary resources. However, researchers often find that important collections, particularly if they are related to local history and genealogy, are only found at an array of smaller repositories, including: historical and genealogical societies; museums in historical houses; local history rooms in public libraries; the archives of private businesses and non-profit organizations; and the libraries of community colleges and private colleges and universities.

The problems faced by these institutions to manage their holdings with very limited resources are well known. A series of surveys, the last and most comprehensive being the NC ECHO survey completed in 2005, dramatically revealed not only the vast number of cultural institutions holding Special Collections, but also the difficulties they were encountering in adequately managing their holdings. Problems were found in both preservation and access, and included inadequate environmental controls, non-standard shelving, absence of acid free enclosures, confused acquisition and accessioning procedures, and the lack of finding aids to describe their holdings.

To meet these needs the SHRAB and the State Archives, together with the Society of North Carolina Archivists (SNCA), and the North Carolina Preservation Consortium (NCPC), have developed programs and initiatives to reach out to these local institutions. Programs to provide small grants for supplies, such as the ongoing initiative sponsored by NCPC, and to teach the basics of archival practices, such as the SHRAB-SNCA Boot Camp workshops, have been developed and proven useful. But, clearly, what has been missing is direct outreach to the repositories: the sending of trained professionals to look at real conditions and to work with local staff and managers ON THEIR TURF to identify and implement improvements; or, in short, to do the work of a field service organization.

To prove the need for such an organization and to demonstrate its usefulness, the idea of the Traveling Archivist Program emerged. NHPRC was asked to fund this initiative through the SNAP grant program as test of the field service concept.

And so, TAP was born.

#### Experience:

At the risk of tooting our horn too loudly, let me say that the Traveling Archivist program has clearly delivered more bang for the buck than most State/Federal programs. For roughly \$26,000 spent over the 18-month life of the initiative, the Traveling Archivist will have visited 42 repositories spread throughout the state. The administrative overhead has been kept very low. Thanks to the hard work of Andrea Gabriel and Dick Lankford, we were able to create a simple, streamlined program that Andrea has managed along with her other duties. Andrea wrote the grant, prepared application forms, and submitted the progress reports to NHPRC. She and I, mainly through phone calls and e-mails, worked together to keep the program on track as I implemented the overall plan. Let me describe the steps taken and the Program's accomplishments.

Early in the planning process we decided to split the 40 site visits into two 20 visit cycles. We developed a simple application form and announced the program in November 2009 through various electronic mailing lists and list serves. The TAP Cycle 2 was announced in March 2010. Handout #1 is the application form. For Cycle 1 we received 36 applications and for Cycle 2 we received 20 applications. Two SHRAB members, Janis Holder and Madeleine Perez volunteered to assist Dick, Andrea, and I review the applications for both cycles. Criteria for consideration were eligibility and need, and selection occurred during two long conference calls. From Cycle One, 25 institutions were chosen, and from Cycle Two, 18 were chosen. One institution dropped out, so when the project is complete, the Traveling Archivist will have conducted 42 site visits. Handout #2 shows the breakdown by type of institution: 11 Museums; 8 Small Colleges and Universities, including 3 HBCU's (Shaw University, Livingstone College and Bennett College); 3 Community Colleges, 8 Historical Societies, and 11 Local History Rooms in Public Libraries, and one Institutional Archives (Qualla Arts and Crafts Mutual). Handout #2 also reveals the geographic extent of the program. Not only has the Traveling Archivist has conducted multiple site visits in Mecklenburg, Forsyth, Guildford, and Wake counties; but he has also been to some of the smaller, remote counties from one end of the state to the other, including Cherokee, Mitchell, Gates, Caswell, Jackson, and Hyde.

Each site visit is carefully planned. Institutions within 2 ½ hours drive from Asheville are conducted as (long) day trips. Others further away are grouped, usually in threes, to cut down on mileage and per diem expenses. About a month before each visit I send the institution a questionnaire, Handout #3, to provide further detailed information to help me structure the visit. You will notice that each manager has the option of asking me to teach an afternoon workshop on either preservation or the preparation of finding aids to their staff. About one quarter have chosen this option, although most ask for an informal visit structured around specific issues: space planning, dealing with certain types of materials such as scrapbooks, providing reference services, or general management concerns such as fund raising and grants.

The site visits last all day. In the morning I conduct a survey of the institution inspecting all space where collections are stored, displayed, processed, or used by researchers. I carefully note and discuss problems and concerns as the survey proceeds. For example: storage areas may lack adequate climate controls and environmental monitoring equipment; collections may be stored on the floor; security might be problematic. If the institution is a museum I look carefully for original documents and photographs on display, and tactfully recommend that they be replaced by copies. I also survey all collections for content and the presence or absence of finding aids, beginning with donor records and inventories. Finally, I ask to see reading rooms and have the manager describe reference and research procedures, including the use of forms to register readers and rules for collection use.

In the afternoon, unless I teach a workshop, I discuss with the manager and other employees and volunteers, what my survey has uncovered. I also handout the contents of the kit and demonstrate the value of using acid free enclosures and the range of supplies available from Gaylord and other vendors. I try to discuss matters positively, trying to make suggestions that are practical and cost effective. For example, in almost all the repositories I have visited, environmental controls in storage areas are inadequate. In particular, old and outmoded HVAC systems are unable to maintain steady levels of temperature and humidity within recommended guidelines. High humidity is a constant concern risking the development of mold and mildew. I try to suggest remedies from the use of dehumidifiers, re-engineering to improve airflow, or providing stand alone systems (Liebert units) in storage rooms isolated from antiquated central HVAC systems. Moreover, I urge managers to measure and record temperature and humidity on a regular schedule through the use of simple hygrometers to justify requests for HVAC improvement. If I believe they are necessary and will be used, I give the manager a small hygrometer from a group that we purchased from a vendor. If a workshop is taught, my discussions with the manager do not begin until after 3 pm, sometimes continuing for several hours. I have, at times, found myself leaving a site after 5:30 pm, only to face a two hour drive to a hotel near the next day's appointment. At the end of such a day, the Traveling Archivist has morphed into a Road Warrior, stumbling into a Comfort Inn with a suitcase and a Subway sandwich.

I use my notes from the visit to prepare a written site report. This is a formal document whose heart is a series of recommendations that restate the main points of my concluding session with the manager. That is, I do not want to blind side the manager by raising issues that were not discussed. And, I stay away from "pie-in-the-sky" suggestions like constructing a new building or de-accessioning half the collections. I try to be brief, succinct, and provide the manager with a document he or she can use to argue for resources from allocators, or to support grant proposals. Handout #4 is a typical Site Visit Report. Finally, accompanying the report, I send a Follow Up Evaluation form, Handout #5, asking the

manager to rate the effectiveness of the Traveling Archivist program and to make suggestions for improvement.

### TAP, Field Services, and the Future:

The Travelling Archivist Program's greatest accomplishment is to validate the Field Services concept. We have demonstrated that a program that sends trained, professional archivists into the field can engage with and effect change in the smaller repositories of historical records throughout North Carolina. Although the evermore sophisticated technological tools available may seem to offer alternatives to this approach, my experience this year tells me that there is no substitute for direct, face-to-face communication on site. Opening up boxes or file drawers to survey collections, or getting down on your hands and knees to check for mold behind shelves means you have to be there. Twitter, etc. is of NO HELP.

This program should be continued in some form. How this can be done administratively and where funding can be found is not my call. However, I would venture to suggest that whatever form it takes, Traveling Archivist II should address four issues.

1. The Traveling Archivist Program was built around the site visit. However, it was a one shot deal. Like a modern Caesar, I came, I saw, and I wrote a report making suggestions for improvement. But it has become clear to me, particularly from phone calls and emails I have received from participants requesting further help and advice, that follow up is necessary. For example, at several institutions, including Shaw University and Qualla Arts and Crafts Mutual, I strongly suggested that a staff member undertake a survey of the archival collections as a starting point to setting priorities for a processing plan. In both cases I promised to stay in contact and come back to look over the collections and help define a work plan. This I will do on my own time and dime because I am afraid that the two young women I sent down this path will get discouraged and hesitate because they lack the training to begin to arrange and describe that first series of records. I also know that I can teach them in a day the rudiments of processing that will give them the confidence to proceed. In short, following up and staying engaged when appropriate should be a priority for TAP II.
2. One of the greatest problems facing the managers of the state's small repositories holding special collections is lack of training. The SHRAB made a start at addressing this problem through the Archives 101, or Boot Camp workshops that were developed in 2004-05. SNCA, our partner in that project was to continue offering the workshops, but only reluctantly has done so. In the past three years, Boot Camp has only been offered twice, as a workshop in conjunction with a SNCA meeting. Moreover the teaching modules have not been revised and updated, bibliographies are out of date, and a cadre of new instructors has not been recruited. Meanwhile, the managers and staff of many local repositories have been replaced, creating a new audience in need of training.

TAP II should undertake to revive Boot Camp and take it on the road to the more remote parts of the state. With SNCA's help (if willing) new instructors should be recruited and the curriculum updated and improved. Venues should be chosen and participants recruited. Costs should be subsidized to keep the fees within the means of low paid managers and unpaid volunteers.

3. TAP II should provide leadership in helping local repositories overcome another problem, the lack of trained assistance for projects to improve storage, access, and outreach. One way to provide help would be to coordinate the placement of interns from the Public History programs of the state's colleges and universities. The TAP administrator could contact the directors of these programs and through a conference call and follow-up e-mails, introduce them to the TAP and ask them to help place interns, who would work for academic credit, with nearby repositories seeking help. In other words, the TAP would serve as a broker between the repositories and the Public History programs, facilitating arrangements to meet the needs of both students and repositories.
4. Finally, I would hope TAP II would address the lack of sources of small grants to help carry out the Traveling Archivist's recommendations. In particular, small repositories are often unable to fund inexpensive improvements to their storage environments, such as the purchase of de-humidifiers; to engage consultants with expertise in rare book or textile conservation; or to purchase acid free boxes and folders for processing projects.

One way to overcome this problem would be to partner with NCPC which has an excellent ongoing small grant program that funds similar projects. TAP II would supply state funds, say \$5,000, and NCPC would administrate the grants in coordination with the Travelling Archivist's recommendations of repositories and projects.

To carry out a program designed to address the four issues defined above, as well as to continue site visits, will require an administrator with the State Archives to devote substantially more time than was necessary to coordinate TAPI. Also, it would be useful to recruit other Traveling Archivists from among the recently retired professionals of the past several years. It would certainly help reduce the necessity for cross state travel if TA consultants could be found in the Triangle, in Eastern NC, and in metro Charlotte.

Finally, if the above suggestions are simply too ambitious or too expensive, I would hope that Traveling Archivist can carry on in some more modest form. Indeed, I would commit to conducting further site visits and engaging in follow-up activities with those institutions from the original 42 participants. Whatever is decided, we must not lose the momentum toward improvement that the Traveling Archivist program has begun.

## SHRAB Presentation, 4/23/12 Report on the Traveling Archivist Program

Harry Keiner, Ph.D  
Consulting Archivist & Historian

Good Morning. My purpose today is to report on the Traveling Archivist Program. It is hard to believe that, with the final site visits and re-visits scheduled for June, 2012, I will have been working on TAP with Andrea for almost four years. I do not want to review all the twists and turns in this story, but I do want to sum up what I think are the accomplishments of the program, and to suggest a future course.

As you know, the origins of the TAP lay in the findings of the NC ECHO survey, conducted in 2004-2005, that there were over 900 institutions in North Carolina holding special collections. This led the members of SHRAB to include in the update of the board's strategic plan in 2006 a goal calling for the establishment of a field services initiative. These field services were to be directed towards the "have-nots," among the 900, i.e. the state's smaller repositories that lacked resources to adequately manage their holdings.

Further planning produced the Traveling Archivist Program, an initiative to send a professional archivist to the local history rooms in the public libraries, the archives of small colleges and museums, and the county historical societies. On site for a day, this traveling archivist would survey collections, discuss preservation and access issues, and, in a follow-up report, make a series of practical recommendations to improve collection management and care. TAP I was paid for by a SNAP grant from NHPRC. Dick Lankford chose the grant's author, Andrea Gabriel, to manage the program, and chose me to execute the site visits and write the reports.

During the second half of 2009, the first applications for TAP site visits were received and evaluated resulting in the selection of twenty-three repositories. Site visits began in January 2010. A second round of applications was reviewed in April, and nineteen more site visits were scheduled through the end of the year.

TAP II began in March, 2011 and is scheduled to conclude in August of this year. The main difference between the two programs is that we invited TAP I participants to request a revisit from the Traveling Archivist. These revisits are mainly devoted to implementing a specific recommendation in the site visit report, and they often include teaching a workshop to staff. For example, several months ago I went back to the Forsyth Public Library and at their request I prepared and taught a workshop on creating collection level MARC records for inclusion in the library's OPAC from standard archival finding aids, including ways to link the full text of the finding aid to the MARC record through the 856 field. In other words, I showed how to cross walk specific data elements from the finding aid to the applicable MARC field, while at the same time emphasizing the need for consistency in preparing the finding aids, not only for the MARC project, but eventually for mark up into EAD, Encoded Archival Description.

Another important element of the revisits is that project implementation was also assisted by offering to provide a limited amount of supplies to get the work underway. These supplies were purchased from funds contributed by the Friends of the North Carolina Archives. For example, Marcellaus Joiner, the young archivist at Bennett College, asked me to come back and work with him on organizing a survey of a huge record group, the papers of a recently retired president of the college. We spent the day sorting through boxes to reestablish the original filing order as a first step to defining an overall scheme of series. To help keep the momentum of the project going, I left behind 10 Hollinger Boxes and 100 acid free file folders, about \$90.00 worth of high-quality supplies.

I have summarized my work on TAP I and TAP II in the handout. In TAP I we conducted forty-two site visits. When TAP II concludes, we will have conducted an additional twenty-four site visits, and twenty-one revisits. Among the sixty-six sites receiving an initial visit, eighteen were museums, twelve were small colleges, including four HBCU's (Shaw, Bennett, Livingstone, and St. Augustine's), four community colleges, eleven historical societies, seventeen local history rooms in public libraries, and four institutional archives (Qualla Co-Operative, Bob Moog Foundation, Fisher Park Neighborhood Assoc., and Perquimans Restoration Assoc.).

My written reports on each site visit contain a wealth of information. At a macro level they provide an overview of North Carolina's historical records held in its smaller repositories. They confirm the findings of the most recent surveys sponsored by the SHRAB and NC EHO regarding the breadth and depth of these collections, including the discovery of major photograph collections at the Granville County Historical Society, the Braswell Memorial Library in Rocky Mount, UNC-Pembroke's university archives, and the Columbus County Library. Unfortunately, they also confirm the difficulties faced by small repositories in preserving and providing access to their holdings.

It is here that I believe we have made a real difference. It is clear from the revisit applications, that they had taken seriously the recommendations in my reports and tried to implement many specific suggestions through projects: using the hygrometers we provided to measure temperature and relative humidity daily in their storage rooms, surveying their holdings as a first step in collection processing, and re-housing collections in acid free enclosures and containers. As noted above, all the revisit requests sought further help to accomplish specific projects, such as teaching workshops on processing and writing finding aids. As a result, the State Archives, through the Traveling Archivist, has engaged North Carolinians directly responsible for maintaining a significant portion of our documentary heritage. We have gone to forty-two counties, from Cherokee to Currituck, working cooperatively to find simple, practical ways to improve preservation and accessibility to this heritage. And we have established relationships for ongoing improvement.

I hope these reports, and the work and experiences they reflect, provide a baseline for future field service and outreach activities. Although we have done a lot and accomplished a lot, there is still much more work to do, work that can only be done by staying ENGAGED with those local institutions holding special collections.

So where do we go from here? I hope that the SHRAB will support building upon the Traveling Archivist program. Assuming that you agree to this overall proposition, I would like to suggest a bigger and better TAP III that would nevertheless cost about the same as TAP II.



Without going into great detail, the basic proposal would be to divide the state into its usual three regions: Coastal, Piedmont, and Mountains, and hire three contract archivists to be responsible for site visits and revisits in their region. Overall management of the program would remain with Andrea and she would directly supervise the contract archivist responsible for the Piedmont. The Traveling Archivist for the Coastal region would work out of the Outer Banks History Center and coordinate his or her activities with a designated staff member. The Traveling Archivist for the Mountains would coordinate their activities with staff at the Western Office in Oteen. I am not in a position to discuss finances, but it should be obvious that such a scheme would produce more bang for the buck by saving money through reductions in travel costs. Distances to sites would be shorter reducing mileage expenditures, and many visits would become day trips, avoiding hotel expenses and some meals.

Finally, I would like to make another suggestion for TAP III. As you know, when we decided to include revisits in TAP II it was obvious that a significant boost could be given to processing and re-housing projects by providing some supplies to get the projects started. Therefore, the State Archivist agreed to set aside \$3,000 from the Friends of the Archives budget to purchase supplies that I would take on my trips for distribution. This was very helpful, but it was administratively “clunky,” mainly because we were trying to come up with a way to buy and distribute what was needed without running afoul of state purchasing rules. Therefore, I would like to spring a little surprise on Robert, and suggest that a better, and more administratively sound way to get these supplies to those in need, is to partner up with NCPC and ask the applicants for revisits who also need supplies to seek them by requesting help through NCPC’s small Preservation Grant Program. In other words, the State Archives block grants say \$5,000 to NCPC to be used for this program minus administrative expenses. Also, it would be helpful if the new State Librarian could be convinced to peel off \$5,000 in LSTA money for the same purpose, with the understanding that the money would be reserved for the Local History rooms in the public libraries participating in TAP III revisits. That would allow the State Archives’ \$5,000 to be reserved for the non-library repositories, such as museums and historical societies.

Thank you for your time. I want to close by thanking the SHRAB for the confidence you have shown in me as your representative. The Traveling Archivist has fulfilled my dream of being a latter day Charles Kuralt-like figure traveling the highways and byways of North Carolina doing something I love, spreading the gospel of preserving the state’s history. I have been blessed to work first for Dick and now Sarah, and of course to have been directly supervised, encouraged, and supported by my friend Andrea Gabriel. Again, thank you.

***TAP Training Manual***  
***Section 3: Teaching Tools and Resources***

## The Eight Elements of a Collection Policy

**Element 1:** Record the name of your Historical Records Program and its parent organization. Include other administrative information such as whether or not there is a Board of Directors or other form of governing authority.

**Element 2:** Briefly state the purpose(s) of your historical records program and its parent organization. This statement of purpose should clearly convey the reasons that your historical records program exists. This statement of purpose should explicitly answer these questions:

- What subject(s), group(s), or region(s) is your historical records program designed to document?
- What types or genres of material will your historical records program collect?
- How will the materials that you collect be used?
- Who are the primary users of your program's collections?

**Element 3:** Describe in detail the various subject foci or collecting themes that your program seeks to document. The description that you provide in this element should be explicit enough to guide selection decisions.

**Element 4:** Describe the types of material formats (e.g., manuscripts, photographs, videotapes, etc.) that your program will consider including in its collection. You may also wish to detail those particular formats that your program will not consider. Within this element you may also note material condition issues (e.g., active mold, extensive reformatting, sticky shed, etc.) that are too problematic for inclusion in your collection.

**Element 5:** Describe how (e.g., solicitation of donations, purchases, loans, institutional transfers, etc.) your records program will acquire new materials. The acquisition of historical records involves the legal transfer, either permanent or temporary, of private property. On occasion a transfer will involve certain conditions that restrict your use of the transferred materials. In reviewing your program's acquisition practices, it is important to develop an institutional response for the following situations:

- Will your program accept archival materials that are offered on a temporary basis?
- Will your program accept transfers that include restrictions or mandate conditions on your legal control of archival materials?

**Element 6:** In the course of reviewing your collections and constructing a collection policy you may discover that your records program has holdings that for any number of reasons (e.g., subject matter, duplication, format, condition, transfer mechanism, etc.) fall outside of the parameters you have established in your collection policy. If these out-of-scope collections are judged to be unworthy of further program support, what procedures will be employed to remove or deaccession these materials? In developing your program's deaccessioning policy it is important to define in general terms the process that your institution has established for removing materials from its

collections. In describing these practices you should be sure to explicitly state who has the authority to remove archival materials.

**Element 7:** Describe the terms and conditions under which your records program will loan its holdings to other institutions. Specific consideration should be given to the following:

- What kinds of materials will be made available for loan?
- For how long will the materials be loaned?
- Who has the authority to loan materials?
- What are the standards of care and handling that must be agreed to as a part of the loan?
- Under what circumstances can a loan be terminated?

Further information is available in "Guidelines for Borrowing Special Collections Materials for Exhibition" at <http://www.ala.org/ala/acrl/acrlstandards/guidelinesborrowing.htm>.

**Element 8:** Describe the review process that will be employed to keep your collection policy current and relevant to your institution's mission. This review process should include a formal mechanism for securing the support and approval of your Board of Directors or other form of governing authority.

**Adapted from material developed by the NY-OH-MI archival education group in 2004. Reprinted with permission.**

# Mission Statements

Mission statements vary. They tend to be broad statements of intent that explain an organization's overall goals, core values, products, and/or services. Mission statements can be brief and to the point. For example:

**The Plainfield County Historical Society is a non-profit, membership-supported organization dedicated to preserving, protecting and promoting the history of Plainfield County, North Carolina.**

Or, they can go into more detail:

**The Plainfield County Historical Society is a not-for-profit association of those who subscribe annually to its membership. As a 501c3 educational institution, the Society disseminates information and stimulates interest through its collections, publications, information sessions, meetings, and special programs for the furtherance of the Society's purpose. The purpose is to collect, preserve, research, exhibit, and educate with those published sources, records and manuscripts, and objects and artifacts that serve to illuminate the human experience in Plainfield County.**

## **Plainfield County Historical Society**

### **Collection Policy: Archives**

The Archives of the Plainfield County Historical Society are a unit of the Society's Library, located in the Old School Building on South Pine Boulevard, Windham, NC. The Archives supports the mission of the Society by being the repository for the Special Collections documenting the history of Plainfield County. The Archives also collects and manages the institutional records of the Society. All Special Collections held in the Archives, provided they have been cataloged, are available for research in the Library's search room. Users are required to present a valid ID and agree to abide by the Library's policies and procedures for the use of Special Collections.

The Archives collects historical materials related to the political, economic, and social life of Plainfield County. At present, the Society's collections document certain historical themes and movements, and it is hoped that future acquisitions will add further depth and breadth to these areas of strength. These areas include: the early settlement of the county in the 1790s; agriculture; the formation of political parties in the nineteenth century and their role in local and statewide elections; the Civil War; the building and impact of railroads; the establishment, growth, and decline of the cotton textile industry; World War I and World War II; the medical and legal professions; public entertainment and pastimes; and local education. New areas of interest that the Archives seek to document include: the growth of tourism in the county after World War II; and the role of immigration from Mexico and other Latin American countries beginning in the 1970s.

The Archives acquires Special Collections in a variety of formats. These include: rare books, manuscripts and family papers (such as correspondence), diaries, scrapbooks, photographic material (including prints, slides, and negatives), paper ephemera (pamphlets and brochures, posters, handbills, and printed announcements), oral history tapes and transcripts, and 8 mm and 16 mm motion picture film. The archives does not collect records in the following formats: obsolete electronic media (such as computer "floppy" discs), 35 mm motion picture film, and video recordings (VHS, Beta, and earlier standards), because of the instability of the media and future costs associated with re-formatting. Also, artifacts and three dimensional objects contained in collections acquired by the Archives will be transferred to the Society's museum, and all published works not designated as rare, will be transferred to the Society's library.

All acquisitions to the Archives are governed by the Plainfield Historical Society's donation policies and procedures. Materials may be acquired by gift, bequest, purchase, administrative transfer, or any other legal transaction that consigns title of the material to the Society. In general, the Society will not accept materials as loans or deposits, unless such agreements are clearly to the Society's benefit. The Society will not accept collections that are closed to researchers, beyond an initial period not to exceed five years. Please note: ownership of the intellectual property associated with each acquisition is determined by the Deed of Gift, associated legal documents, and applicable sections of the U.S. Copyright laws. Also note: donors wishing to receive tax deductions are responsible for appraisals.

All Special Collections acquired by the Archives become the property of the Plainfield Historical Society. Their ongoing management is governed by the Society's policies and procedures for all

collections, which specifically address such questions as loans, de-accession of collections, and reproduction of material for commercial use.

**Deed of Gift**

**Plainfield County Historical Society  
Windham, NC**

Date: \_\_\_\_\_

Donor: \_\_\_\_\_

Contact: \_\_\_\_\_  
(if different from Donor)

Address: \_\_\_\_\_  
\_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Collection Title: \_\_\_\_\_

Collection Description: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

An Inventory is attached to this Deed of Gift: Yes \_\_\_\_\_ No \_\_\_\_\_

Terms of the Agreement:

The Donation is received as a Gift; and the Owner or his Agent with full authority, desiring to absolutely transfer full title by signing below, hereby gives, assigns, and conveys finally and completely, and without any limitation or reservation, the property described above to the Society and its successors or assigns permanently and forever., together with (when applicable) any copyrights therein and the right to copyright the same.

Materials transferred will be open for the unrestricted use to any qualified researcher subject to the rules and regulations of the Society. Some or all of the material may be digitized and made publicly available in an online repository. Donations will be handled in accordance with the terms listed below.



The Society may use its discretion in disposing of materials because they are duplicates; they lack any research value; or are deemed to be inappropriate for retention. If specifically directed below, the Society will endeavor to return these materials to the donor.

Additional Terms, Conditions, and Restrictions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Agreement:

In consideration of mutual benefits, I and the Society enter into this agreement for access, use, disposition, and ownership of the donated materials. The Society shall have ownership of these donated materials upon receipt, store these materials according to accepted archival standards, process and prepare finding aids in a timely manner to assure ease of access to the collection.

In the event that the donor from time to time hereafter gives, donates, and conveys for deposit with the Society, additional materials, title to such additional materials shall pass to the Society upon delivery, and all provisions of this Deed of Gift shall be applicable. A separate description and inventory (if necessary) shall be prepared and attached to this deed for each additional transfer.

Credit Line: When cited in an article, museum label, press release or other publication, the collection will be identified as \_\_\_\_\_

\_\_\_\_\_

Donor's Signature and Date: \_\_\_\_\_

Signature, Title and Date of the Plainfield County Historical Society's Representative:

\_\_\_\_\_

Notes:

## Deed of Gift

Plainfield County Historical Society  
Windham, NC

Date: *January 19, 1997*

Donor: *Veronica Curran*

Contact: \_\_\_\_\_  
(if different from Donor)

Address: *121 Spring Street*  
*Windham, NC 28807*

Home Phone: *(704)663-1988*

Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Collection Title: *Curran Family Materials Related to World War II*

Collection Description: *The collection consists of two boxes of material mainly related to Robert Henry "Jack" Curran's service in World War II. The bulk of the collection is over 1,000 letters written by Jack Curran to his wife Veronica between 1939 and 1945. Jack Curran was drafted into the Army in 1942. After boot camp he was assigned to the Second Division and served as an infantryman, rising to the rank of Sergeant. Curran and several members of his platoon were captured by German troops in the Battle of the Bulge in December 1944, and he remained a prisoner until the end of the war. Besides the letters, the collection includes Jack Curran's dress uniform, a medal and attached citation, several photographs, and a few miscellaneous items related to his war service.*

An Inventory is attached to this Deed of Gift: Yes  No

Terms of the Agreement:

The Donation is received as a Gift; and the Owner or his Agent with full authority, desiring to absolutely transfer full title by signing below, hereby gives, assigns, and conveys finally and completely, and without any limitation or reservation, the property described above to the Society and its successors or assigns permanently and forever., together with (when applicable) any copyrights therein and the right to copyright the same.

Materials transferred will be open for the unrestricted use to any qualified researcher subject to the rules and regulations of the Society. Some or all of the material may be digitized and made publicly available in an online repository. Donations will be handled in accordance with the terms listed below.

The Society may use its discretion in disposing of materials because they are duplicates; they lack any research value; or are deemed to be inappropriate for retention. If specifically directed below, the Society will endeavor to return these materials to the donor.

Additional Terms, Conditions, and Restrictions: *There are no restrictions regarding access to this collection. However, in accord with the Society's policy, the collection will remain closed until processed. Copyright to Jack Curran's letters remains the property of Veronica Curran and family and permission to publish must be obtained from them.*

Agreement:

In consideration of mutual benefits, I and the Society enter into this agreement for access, use, disposition, and ownership of the donated materials. The Society shall have ownership of these donated materials upon receipt, store these materials according to accepted archival standards, process and prepare finding aids in a timely manner to assure ease of access to the collection.

In the event that the donor from time to time hereafter gives, donates, and conveys for deposit with the Society, additional materials, title to such additional materials shall pass to the Society upon delivery, and all provisions of this Deed of Gift shall be applicable. A separate description and inventory (if necessary) shall be prepared and attached to this deed for each additional transfer.

Credit Line: When cited in an article, museum label, press release or other publication, the collection will be identified as *To Be Determined*

Donor's Signature and Date: *Veronica Curran January 19, 1997*

Signature, Title and Date of the Plainfield Historical Society's Authorized Representative:

*Jane Vance Assistant Director and Curator January 19, 1997*

Notes:

1. *Letters, photographs, and miscellaneous manuscript materials accessioned to archives on January 29, 1999. Uniform and medal accessioned to the museum on January 29, 1999.*
2. *Mrs. Veronica Curran passed away on June 24, 2006. Her daughter, Betsy Ann Curran Shoemaker, lives in Florida (for contact information, see collection file)*

PLAINFIELD COUNTY HISTORICAL SOCIETY  
Deed of Gift Inventory

Date: *January 19, 1999*

Name of Collection: *Curran Family Materials Relating to World War 22*

Contents: *Two Boxes*

*Box #1: Letters written by Jack Curran to his wife, Veronica, divided into large expandable folders by year. 1939, 1940, 1941, 1942, 1943, 1944.*

*Box # 2: Letters written by Jack Curran to his wife Veronica in 1945 in an expandable folder, copy of Jack Curran's will, Jack Curran's WW22 uniform, 3 photos of Jack Curran in uniform, small box containing Bronze Star medal and accompanying citation, folder of miscellaneous WW22 materials including pay stubs, identification cards, Red Cross documents, and documents relating to Curran's discharge from the US Army in 1945.*

**PLAINFIELD COUNTY HISTORICAL SOCIETY  
Accession Record for Archival Collections**

Accession Number: \_\_\_\_\_

Date: \_\_\_\_\_

Date Received: \_\_\_\_\_

Location: \_\_\_\_\_

Donor (or Donor's Agent): \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Email Address \_\_\_\_\_

Accession Title: \_\_\_\_\_

Provenance: \_\_\_\_\_

Inclusive Dates: \_\_\_\_\_ Bulk Dates: \_\_\_\_\_

Biographical Information/Administrative History: \_\_\_\_\_

Contents:

\_\_\_ Textual Records

\_\_\_ Sound Recordings

\_\_\_ Maps/Plans

\_\_\_ Photographs

\_\_\_ Books/Publications

\_\_\_ Ephemera

\_\_\_ Prints/Paintings/Drawings

\_\_\_ Film/Video

\_\_\_ Other (describe)

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Extent: \_\_\_\_\_

Description: \_\_\_\_\_

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Condition: \_\_\_\_\_

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Acquisition Information:

Donation                       Transfer                       Purchase

Deposit (Explain Terms) \_\_\_\_\_

Notes: \_\_\_\_\_

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Finding Aid Attached    Finding Aid URL \_\_\_\_\_

Accession Approved by: \_\_\_\_\_

PLEASE ATTACH ADDITIONAL PAGES TO CONTINUE ALL DESCRIPTIONS AND NOTES

PLAINFIELD COUNTY HISTORICAL SOCIETY  
Accession Record for Archival Collections

Accession Number: **1999.006**

Date: **January 29, 1999**

Date Received: **January 19, 1999**

Location: Storage Room, **Range G, Shelf V3**

Donor (or Donor's Agent): **Veronica Curran**

Mailing Address: **121 Spring Street**

**Windham, NC 28809**

Telephone Number: **(704)663-1988**

Email Address:

Accession Title: **Veronica Curran World War II Letters, 1939-1945**

Provenance: **All of the letters in the collection were written by Jack Curran to his wife Veronica between 1939 and 1945. However, his letters written from a German Prisoner of War Camp in 1945 were only obtained by Mrs. Curran under the terms of Jack's will after his death in 1962. The letters, several photographs, and miscellaneous ephemera were deeded by Mrs. Curran to the Society in 1999.**

Inclusive Dates: **1939 – 1962**

Bulk Dates: **1939 - 1945**

Biographical Information/Administrative History: **Robert Henry "Jack" Curran was born in Goodspeed, NC in 1915. He graduated from Plainfield High School in 1934. After several years working in a local hardware store, he attended the Raleigh Business College, graduating with a Certificate in Marketing in 1938. He was then hired by Ginn & Company, a Boston publisher of school books, and represented Ginn in several Southeastern states until he was drafted in 1942. Following boot camp at Fort Bragg, NC, Curran was assigned to an Infantry Regiment with the US Army's Second Division. By the time the Second Division deployed to England in preparation for the Normandy Invasion, Curran had risen to the rank of Sergeant. Returning to civilian life, Curran took a job in the Personnel Office of the Plainfield Manufacturing Company. He worked there until his death in 1962.**

**Jack met Veronica Williams at a church supper in 1936. They were married in 1937 and their daughter, Betsy Anne was born in 1939. From 1948 until her retirement in 1983, Veronica Curran served as the secretary of the Spring Street Elementary School in Windham.**

Contents:

<input checked="" type="checkbox"/> Textual Records	<input type="checkbox"/> Sound Recordings	<input type="checkbox"/> Maps/Plans
<input checked="" type="checkbox"/> Photographs	<input type="checkbox"/> Books/Publications	<input checked="" type="checkbox"/> Ephemera
<input type="checkbox"/> Prints/Paintings/Drawings	<input type="checkbox"/> Film/Video	<input type="checkbox"/> Other (describe)

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Extent: **1 box and 1 expandable file, 1.2 cubic feet**

**Description: This collection mainly contains letters written by Jack Curran to his wife Veronica from 1939 to 1945. Curran apparently began to write regularly, sometimes daily, to his wife after he took a job with the publishing firm Ginn & Company. His work required him to travel extensively throughout several southeastern states keeping him away from his wife and infant daughter. Written between 1939 and the end of 1942, the letters reflect his life as a salesman and what he observes and experiences in the region's towns and cities.**

**After being drafted in 1942, Curran continued writing home regularly. Together his letters paint an intimate and detailed portrait of a "citizen soldier," the backbone of the U.S. Army in World War II. His letters throughout 1943 and early 1944 mainly deal with the training regimen and the added responsibilities he shoulders as he is promoted steadily through the non-commissioned ranks until, on the eve of D-Day he is the Sergeant of a rifle platoon. Once in France, his letters describe his experiences as the Second Division fights its way through France. Curran's combat experiences and letters home abruptly end in December 1944 when he is captured during the opening phase of the Battle of the Bulge. The final letters in the collection, written in 1945, describe his life as a POW. These were never mailed and were only given to his wife under the terms of his will following his death in 1962.**

**Condition: For the most part, the letters in the collection are in good condition. Several telegrams are included and they should be reformatted, as the paper has become brittle. The V-mail letters are fragile but there are no tears or yellowing, but they should be used by researchers with caution.**

Acquisition Information:

Donation                       Transfer                       Purchase

Deposit (Explain Terms) \_\_\_\_\_



Notes: **Objects contained in this donation have been removed and are registered in the Society's Object Collection: See: A1999.012 Curran's dress uniform; A1999.013 Curran's dress uniform hat; A1999.014 Bronze Star medal, awarded to Curran in March 1944.**

Finding Aid Attached    Finding Aid URL \_\_\_\_\_

Accession Approved by: **Jane Vance, Assistant Director and Curator**

**PLAINFIELD COUNTY HISTORICAL SOCIETY**  
**Accession Record for Archival Collections: Inventory**

Accession Number: **1999.006**

Accession Title: **Veronica Curran World War II Letters, 1939 – 1945**

<u>Box #</u>	<u>Folder #</u>	<u>Folder Name:</u>
Box 1	Folder 1	January-March 1939
Box 1	Folder 2	April-June 1939
Box 1	Folder 3	July-September 1939
Box 1	Folder 4	October 1939-February 1940
Box 1	Folder 5	March-September 1940
Box 1	Folder 6	October-December 1940
Box 1	Folder 7	January-April 1941
Box 1	Folder 8	May-December 1941
Box 1	Folder 9	January-March 1942
Box 1	Folder 10	April-September 1942
Box 1	Folder 11	October 1942
Box 1	Folder 12	November 1942
Box 1	Folder 13	December 1942-January 1943
Box 1	Folder 14	February-April 1943
Box 1	Folder 15	May 1943-June 1943
Box 1	Folder 16	July-August 1943
Box 1	Folder 17	September-October 1943
Box 1	Folder 18	November-December 1943
Box 1	Folder 19	January 1944
Box 1	Folder 20	February 1944
Box 1	Folder 21	March 1944
Box 1	Folder 22	April 1944
Box 1	Folder 23	May 1944
Box 1	Folder 24	June 1944
Box 1	Folder 25	July 1944
Box 1	Folder 26	August 1944
Box 1	Folder 27	September 1944
Box 1	Folder 28	October 1944
Box 1	Folder 29	November 1944
Box 1	Folder 30	December 1944
Ex. File 1	Folder 31	Jack Curran's Will, 1962
Ex. File 1	Folder 32	December 1944

Ex. File 1	Folder 33	January 1945
Ex. File 1	Folder 34	February 1945
Ex. File 1	Folder 35	March 1945
Ex. File 1	Folder 36	April 1945
Ex. File 1	Folder 37	May 1945
Ex. File 1	Folder 38	June-August 1945
Ex. File 1	Folder 39	September 1945
Ex. File 1	Folder 40	3 photos of Jack Curran in Uniform
Ex. File 1	Folder 41	Miscellaneous Ephemera

# Finding Aid

## Veronica Curran World War II Letters

- Repository:** Plainfield County Historical Society  
2762 South Pine Boulevard  
Windham, NC 28809
- Title:** Veronica Curran World War II Letters, 1939-1945
- Creator:** Curran, Veronica, 1918-2006
- Collection No.:** MC 267
- Extent:** About 1,500 items, contained in 4 Hollinger boxes (1.5 linear feet)
- Restrictions:** No Access Restrictions, but Copyright and Permission to Publish must be obtained from descendants. See donor file.
- Provenance:** Received from Veronica Curran of Windham, N.C., in January, 1997 with an Addendum received in July, 2006 from her daughter, Betsy Anne Curran Shoemaker.
- Copyright Notice:** Copyright is retained by the authors of items in these papers, or their descendants, as stipulated by United States copyright law.
- Citation Form:** Plainfield County Historical Society, Archives, MC 267,  
Veronica Curran World War II Letters, 1939-1945
- Alternative Formats:** One photograph of Jack Curran in uniform (Box 4, Folder 39), was digitized in 2010 and published by the Society on line in the Exhibit, [Plainfield County Goes to War](#). The exhibit remains available at: [www.PlainfieldCHS/exhibits/PCHSinWWII/html](http://www.PlainfieldCHS/exhibits/PCHSinWWII/html)
- Related Collections:** Jack Curran's uniform and Bronze Star medal are held in the PCHS's Museum Collections

### Abstract

Robert Henry "Jack" Curran of Windham, NC, was drafted into the United States Army in December 1942. After Boot Camp and Advanced Infantry Training, Curran was assigned to the US 2<sup>nd</sup> Infantry Division. When the 2<sup>nd</sup> Division landed in Normandy on June 7<sup>th</sup>, Curran was a Platoon Sergeant in Company K, 3<sup>rd</sup> Battalion, 38<sup>th</sup> Infantry Regiment. His unit fought in France for the next six months until Curran was captured by the Germans in the Ardennes Forest during the Battle of the Bulge in December 1944. In May 1945, his POW camp was liberated by Soviet troops and Curran repatriated. This collection is chiefly letters written by Curran to his wife, Veronica Curran, first as a traveling

salesman and then as a soldier in World War II. Curran was a devoted letter writer and wrote home almost daily about his experiences, first as a civilian, and then as a “citizen soldier.”

### **Biographical Note**

Robert Henry “Jack” Curran of Windahm, NC, was a sales representative for Ginn & Company, a Boston school book publisher. He had taken this job in 1939 and was assigned a territory that included: North Carolina South Carolina, Georgia and Florida. He was drafted into the United States Army in December 1942 and served as a non-commissioned officer in the Army’s Second Infantry (Indianhead) Division during World War II until his discharge in the late fall of 1945.

Curran was twenty-seven when he was drafted and his work history and experience served him well as he rose quickly in the ranks while the Second Division trained for overseas deployment at Camp Sparta, Wisconsin.

After the Second Division deployed to Northern Ireland in October 1943, Curran was promoted to the rank of Sergeant and assigned as a platoon leader in Company K, 3<sup>rd</sup> Battalion, 38<sup>th</sup> Infantry Regiment. As a noncommissioned officer carrying out the orders of the Lieutenant in command of the platoon, Curran had a many responsibilities overseeing the wellbeing of the men in his platoon. As the 38<sup>th</sup> Regiment advanced through France in the latter months of 1944, the fighting was often fierce and casualties were heavy. In September, 1944, Curran’s platoon was involved in a series of battles that eventually resulted in the capture of Brest, an important port in Brittany. For his bravery in capturing a German pillbox that was delaying an attack on the high ground to the south of the city, Curran was awarded a Bronze Star.

The Second Division then joined the general Allied offense eastward toward Germany. In mid-December, the German Army launched a fierce counterattack through the Ardennes Forest, the opening thrust in what is now known as the Battle of the Bulge. On December 17, Curran and some of his men became cut off by the quick-moving Germans. Surrounded, they were forced to surrender. After his capture Curran was transported to a Prisoner of War Camp, Stalag 9B, in Bad Orb, Hessen-Nassau, Prussia. In May 1945 the camp was liberated by Soviet troops and Curran was repatriated, eventually arriving in New York on June 12, 1945.

### **Chronology**

March 15, 1915	Robert Henry “Jack” Curran born in Goodspeed, NC.
June, 1934	Graduated from Plainfield County Regional High School
May, 1937	Married Veronica Williams.
January 1939	Daughter Betsy Anne born
February, 1939	Employed by Ginn & Company
December 1942	Inducted into the United States Army at Fort Joseph, Ky.

January-March 1943 Basic Training at Fort Bragg in Fayetteville, NC

April-June 1943 Advanced Infantry Training at Fort Bragg, NC

July-October 1943 Joins Second Division, Camp Sparta, WI. Promoted to Corporal and serves with Headquarters Company, 3<sup>rd</sup> Battalion, 38<sup>th</sup> Regiment.

November 15, 1943 Promoted to Sergeant

December-June-1944 Lead NCO, Second Platoon, Kilo Company, 3<sup>rd</sup> Battalion, 38<sup>th</sup> Infantry Regiment.

June 76, 1944 Lands on Omaha Beach, Normandy, the day after D-Day.

July-October, 1944 Participated in combat operations in Northern France, including the capture of Brest, Normandy, and is awarded the Bronze Star.

December 17, 1944 Captured in the Ardennes Forest during the Battle of the Bulge

December 1944 Transported east into Germany

December 28, 1944 Reported “Killed in Action” by the War Department

January 27, 1945 Interned at Stalag 9B, Bad Orb in Hessen-Nassau, Prussia

January 31, 1945 War Department revised “Killed in Action” report to “Missing in Action,” presumed prisoner of war.

May 4, 1945 Stalag 9B is liberated by Soviet forces.

June 12, 1945 Repatriated, returns to U.S. landing in New York

### **Scope and Content Note**

This collection consists mainly of letters written by Robert Henry “Jack” Curran of Windham, N.C., to his wife, Veronica Curran (Vera). Prior to World War II, Curran was a salesman for Ginn & Company, a school book publisher located in Boston, Massachusetts. He represented Ginn in the southeastern states of North Carolina, South Carolina, Georgia, and Florida, and it was his habit to write his wife on an almost daily basis while on business trips. These pre-war letters are an important source for research into the practices of American business selling their products through representatives, known collectively as travelling salesmen. They also reflect the thoughts and concerns of a young man, with a wife and baby daughter at home, who had never spent much time beyond the borders of the Old North State.

Curran continued to write home regularly after he entered the U.S. Army at the end of 1942. For the next two years Vera received his letters until mid-December, 1944 when communication abruptly stopped. Three days after Christmas, Vera received notification of her husband’s death; but one month later, the War department notified her that her husband was missing and presumed captured. Curran’s status was later confirmed by the Red Cross which reported his presence in Germany as a Prisoner of War.

The near-daily frequency of Curran's letters presents a detailed portrait of the concerns, fears, and activities of an infantry platoon sergeant during World War II, training and then leading men in combat, followed by a difficult period as a prisoner. Throughout these letters, Curran wrote of his experiences and interaction with the small group of men under his command as they prepared for and participated in combat operations. There are detailed explanations of many United States Army practices including small unit combat tactics, censorship and military secrecy, post-war demobilization, and promotions. Curran's letters also contain detailed and intimate descriptions of worries and fears that he had made errors of judgment. This is particularly true in the 120 letters that Curran wrote after his capture. These letters also contain detailed descriptions of his life as a prisoner, including his journey under armed guard through Germany into Prussia, prison camp regulations, Red Cross inspections, prison guards, and his liberation and journey back to the United States. Letters written prior to June 1944 frequently address the financial needs and concerns of his wife and family back home in Windham, N.C.

Formats contained include letters, telegrams, postcards, and V-mail. Also included are a few miscellaneous items, including: pay stubs, military identity cards, Red Cross documents, a post-war health inspection report, discharge papers, and several formal photographs of Sgt. Curran in uniform, taken before the Second Division deployed to Europe in 1943.

### **Arrangement of Collection**

This collection is arranged into three separate correspondence series based on the original order created by Veronica Curran. She kept the letters in the order that she read them and had divided the letters into groupings based on her husband's status: Civilian Letters, Military Letters, and Prisoner of War Letters. Please note that she received the majority of the Prisoner of War letters in 1962, upon her husband's death. Apparently, he had been unable to mail them during his internment and left instructions to read them in his will.

### **Controlled Access Terms**

Curran, Robert Henry "Jack," 1915-1962.

Curran, Veronica, 1918-1906.

Windham (N.C.)

Prisoners of war—Germany.

Soldiers—United States--Correspondence--History--World War, 1939-1945.

Soldiers—United States--Family relationships.

Traveling sales personnel—United States.

United States. Army. 2<sup>nd</sup> Infantry Division.

United States. Army—Military life.

World War, 1939-1945—Personal narratives, American.

World War, 1939-1945—Prisoners and prisons.

### **Container List**

I. Civilian Letters, 1939-1942  
About 200 items  
Original Order

This Series is comprised of letters written by Robert Henry “Jack” Curran of Windham, N.C., to his wife, Veronica Curran (Vera). Prior to being drafted in November of 1942, Curran was a salesman for Ginn & Company in the southeastern United States, and it was his habit to write his wife on an almost daily basis. Letters address the financial needs and concerns of his wife, infant daughter, and family back home in Windham, and his experiences as a salesman for Ginn & Co., including: travel via railroad to cities and towns (Atlanta, Jacksonville, Tampa, Greensboro, Charleston, and Spartanburg, and many others) for the first time, hotels in these communities, the difficulty of selling books to school boards and officials, impressions of life in the South as World War II approached, and effects of America’s entry into the war on his work.

- Box 1 Folder 1 February-March 1939: Boston, MA, Training at Ginn & Co.; first trips as a salesman to Raleigh, Florence SC, Macon, GA, Atlanta, GA and several small towns.
- Box 1 Folder 2 April-June 1939: Trips to Florida and South Carolina; Impressions of the Southern Railroad dining cars and hotels
- Box 1 Folder 3 July-September 1939: Trips to Western North Carolina and Georgia; first mention of the war in Europe
- Box 1 Folder 4 October 1939-February 1940: Charleston, SC, impressions from a driving trip through the small rural communities to the south of the city
- Box 1 Folder 5 March-September 1940: Trips to Florida and Georgia, description of a hurricane, cotton harvest
- Box 1 Folder 6 October-December 1940: Trips to several communities around Pensacola, FL; difficulties with a local school board over science text/geology
- Box 1 Folder 7 January-April 1941: Travel to several rural communities in South Carolina, trip to Miami and Florida communities north to Jacksonville, attendance at Spring Training baseball games
- Box 1 Folder 8 May-December 1941: Travel throughout his four state territory, observations regarding an improving rural economy, description of the building of the new shipyard in Wilmington, NC, Pearl Harbor.
- Box 1 Folder 9 January-March 1942: Effect of America’s entry into WWII on sales and work, travel in Georgia and North Carolina
- Box 1 Folder 10 April-September 1942: Difficulties traveling by rail in territory, sales trips



to South Carolina and Florida

Box 1 Folder 11      October 1942: Final sales trips in North Carolina. Notes construction of new military bases: Camp Butner north of Durham, and Camp Davis in Onslow County, new employment opportunities

II.      Military Letters, 1942-1944  
About 1,200 items  
Original Order

This Series begins in November 1942 with Curran's induction and is comprised of letters that present a detailed portrait of the concerns, fears, and activities of a draftee who rises from the ranks to become an infantry platoon sergeant leading men in combat. Formats contained include letters, telegrams, postcards, and V-mail.

Throughout these letters, Curran wrote of his concerns for his platoon as they trained for and participated in combat operations. There are detailed explanations of many United States Army practices including small unit combat tactics, censorship and military secrecy, post-war demobilization, and promotions. Curran's letters also contain detailed descriptions of worries and fears that he had made errors of judgment, and word-portraits of men he served with.

Also contained in this series are telegrams from the War Department notifying Mrs. Curran of her husband's death in December 1944 and the subsequent notification that he was being held as a prisoner of war. This Series ends in December 1944 with Curran's capture by German forces.

Box 2 Folder 12      November 1942 Induction into US Army, ordered to Fort Bragg for Boot Camp

Box 2 Folder 13      December 1942-January 1943 Fort Bragg, Boot Camp, Army food and fellow recruits

Box 2 Folder 14      February-April 1943 Fort Bragg, Advanced Infantry Training, leave and home visit, family finances

Box 2 Folder 15      May 1943-June 1943 Assigned to Second Division. Camp McCoy, Sparta, WI, promoted to Corporal, duties and new friends

Box 2 Folder 16      July-August 1943 Camp McCoy, WI Rumors regarding deployment, family finances, leave and travel to North Carolina through Chicago

Box 2 Folder 17      September-October 1943 Move to Camp Shanks, New York, troop ship and convoy to Northern Ireland and on to Second Division base near Armagh

Box 2 Folder 18      November-December 1943 Northern Ireland, Curran promoted to Sergeant

and assigned to a platoon in Company K, 3rd Battalion, 38<sup>th</sup> Regiment, training troops and learning responsibilities

- Box 2 Folder 19 January 1944 Northern Ireland, training and maneuvers, new first lieutenant assigned to platoon, countryside and weather.
- Box 2 Folder 20 February 1944 Northern Ireland, training accident and death of a soldier, dances, pubs
- Box 2 Folder 21 March 1944, Northern Ireland, amphibious training, bad weather
- Box 3 Folder 22 April 1944, Northern Ireland, training and maneuvers, truck crash injures several platoon members, visit by General Patton
- Box 3 Folder 23 May 1944, Division moves to Tenby, Wales, anticipation and rumors
- Box 3 Folder 24 June 1944, Normandy, first combat, fears, first platoon member killed
- Box 3 Folder 25 July 1944, Northern France, combat, food, artillery attack
- Box 3 Folder 26 August 1944, Northern France, fierce fighting, French farms and people
- Box 3 Folder 27 September 1944, Northern France, battle for Brest, Bronze Star, best friend killed
- Box 3 Folder 28 October 1944, Rapid movement of division to Belgium, hot food and showers, replacements
- Box 3 Folder 29 November 1944, Belgium, pushing ahead into Germany, tanks, weather
- Box 3 Folder 30 December 1944, near beautiful woodland, snow and cold

III. Prisoner of War Letters, 1944-1945, 1962, Addenda  
About 150 items  
Original Order

This Series begins in December 1944 when Curran was captured by German forces in the Ardennes Forest during the Battle of the Bulge. Curran's letters contain detailed descriptions of worries and fears that he had made grave errors of judgment. These letters also contain detailed descriptions of his life as a prisoner, including his journey under armed guard through Germany into Prussia, prison camp regulations, Red Cross inspections, prison guards, and his liberation and journey back to the United States in June 1945.

Please note that these Prisoner of War letters were discovered in 1962, upon Curran's death. His will contained instructions for his wife to read these letters which had never been posted. The will, contained in Folder 31, begins the series.

- Box 4 Folder 31 1962, Jack Curran's will
- Box 4 Folder 32 December 1944, Capture and transport to POW camp, Stalag 9B, prison life and food
- Box 4 Folder 33 January 1945, Stalag 9B, Guards, Red Cross, relations with fellow prisoners, camp rules and routine
- Box 4 Folder 34 February 1945, Stalag 9B, weather and general conditions, bribing guards, Bible reading
- Box 4 Folder 35 March 1945, Stalag 9B, fellow prisoners' condition, Red Cross, food, comfort from his Bible
- Box 4 Folder 36 April 1945, Stalag 9B, camp life, waiting, Bible reading
- Box 4 Folder 37 May 1945, Liberation from Stalag 9B, Soviet troops, return to American base, interrogation, food, leave in Paris
- Box 4 Folder 38 June 1945, London and Southampton, passage home, New York, discharge
- Box 4 Folder 39 Miscellaneous: pay stubs, military identity cards, Red Cross documents, citation for Bronze Star, discharge papers, a post-war health inspection report, and three formal photographs of Sgt. Curran in uniform
- Addenda: See, Accession 2007.045, Bible donated by Betsy Anne Curran Reynolds
- Box 4 Folder 40 Small pocket Bible carried by Jack Curran throughout World War II, contains many annotations in margins that appear to have been written while a POW

## Environmental Fact Sheet

**Limiting Light Levels:** Light accelerates the chemical processes that cause historical materials to deteriorate. It is important to minimize your collections' exposure to light, especially Ultraviolet (UV) light. Common sources of UV light included natural sunlight through windows and fluorescent lights found in most commercial buildings.

Light meters can be purchased and even UV light monitors but those devices are not necessary. Limiting your collections' exposure to light is the priority. While measuring is a good idea, just be sure to emphasize preventing exposure. Typical actions to limit UV light exposure include:

- **Enclose archival materials in light tight enclosures.** Historical materials should only be exposed to light during use- research, processing, exhibition)
- **Windows should be covered.** Block the light with window treatments such as heavy curtains, blinds, or shades.
- **Use incandescent bulbs or UV filters on fluorescent lights.** If unable to use incandescent lighting, use filters for windows and UV light fixtures. You can purchase filters designed for the fluorescent light bulbs.
- **Keep storage areas as dark as possible.** Turn off lights when no one is in the storage area. Make sure lights are not left on overnight etc.
- **Limit a document's display in an exhibit case.** Use a surrogate if you plan for long-term exhibition or switch items regularly so that one page does not have prolonged exposure.

**Fire Protection:** Libraries, archives, museums, and historic structures are full of items that are fuel sources for fire. Our buildings also provide numerous possible ignition sources such as electrical systems, heating and air conditioning equipment, heat producing maintenance activities, and electrical appliances. Typical steps to protect your collections from fire damage should include:

- **Hold regular fire drills and staff training.**
- Locate fire extinguishers and smoke detectors in every storage area. Both of these need to be regularly maintained.
- **Train staff on how to use extinguishers.**
- **Reduce Fire Hazards.** Remove extra packing materials, do not store boxes near outlets, avoid overloading outlets with multiple cords etc.
- **Install manual alarm stations.**
- **Ask your local fire Marshal for an inspection.** Most fire departments will provide fire inspections and assist you in developing fire prevention strategies for your institution. It is a good idea that you familiarize the FD with your building and its contents in advance, it is possible their tactics can help lessen damage should you experience a fire.

**Water Protection:** Water damage is the most likely damage your collections are susceptible to. Damp or wet records will have inks that will run, pages that will stick together, colors will bleed, and if left unmonitored, will foster mold growth. Typical steps that can be taken to avoid water damage are:

- **Regular inspection, repair, and cleaning of roof and flashings.**
- **Regular inspection, repair, and cleaning of gutters and drains**
- **Avoid storage beneath water sources.** This includes water/steam pipes, bathrooms, kitchens, air conditioning equipment or any other source of moisture or water. If you can't avoid those areas, make provisions for diverting water such as plastic sheeting not using top shelf.
- **Keep historical materials off the floor.** Store them on shelving or pallets at least 4" clearance
- **Avoid storing historical materials in areas that are vulnerable to flooding.** Basements are notorious for flooding and high moisture. If you must store records in such an area, use water sensing alarms for quick detection of flooding and conduct frequent and regular inspections.
- **Locate and know how to operate water mains and shut off valves.** Locations of the main and shut off valves should be diagrammed and posted for quick reference. Do they require tools to operate, if so, have those stored close by.

**Pest and Rodent Control:** Archival materials are attractive to pests. Their components- wood pulp, lignin, paste, glues, sizing, emulsions and adhesives are a food source for many insects. Paper is also appealing nesting materials for rodents. Moreover, both pests and rodents are attracted to the food, drinks, and plants that staff members and patrons often bring into the repository. To prevent an infestation:

- **Make the storage environment less appealing.** Remove attractive elements like food trash, plants, and restricting drinks from the storage areas and research rooms. Alter practices and procedures to help minimize pest potential like only eating in the designated break areas instead of offices etc.
- **Use sticky traps.** Sticky traps are cost effecting tools for monitoring and capturing pests. If you have an infestation that cannot be controlled using them, seek guidance before resorting to chemical pesticides.
- **Caution when using chemicals.** Chemical pesticides can damage historical materials and should be used with caution. Protect boxes from spray with plastic sheeting and **NEVER** spray anything directly on storage boxes or artifacts.

**Housekeeping/Cleaning:** A regular program of basic housekeeping should be established to maintain clean storage areas. This ongoing cleaning regimen will reduce pests/rodents and help with fire prevention by regularly removing trash. Your tasks should include:

- **Regular trash removal**
- **Sweeping, vacuuming, or damp mopping floors.** HEPA vacuums are preferable to minimize spreading dust and mold spores.
- **Dusting shelves, boxes, exteriors of books.** Use a clean soft cloth or brush.
- **DO NOT use cleaning products that contain oil, chlorine, alum, peroxides or ammonia etc.**

## Environmental Monitoring Equipment Fact Sheet

There are many monitoring devices that can help you monitor your climate. **The key to monitoring climate is to record the measurements systematically.** Once you have recorded measurements over a period of time—a week at a minimum, you can evaluate your climate and determine whether or not you need to take action.

What do you need to monitor climate? You need reliable thermometers and humidity monitors in all your storage areas. These don't have to be expensive, but they do have to be reliable! Humidity can be measured using Humidity Indicator Cards, available from many archival supplies. These cards cost less than \$10 for a package of five cards. Or, for about \$70 you can purchase a hygrometer for measuring relative humidity. For around \$100 you can purchase a simple thermohygrometer (also called a hygrothermometer) that measures both temperature and Relative Humidity (RH). There are also digital versions of hygrometer and hygrothermometers- but those can be expensive. For continuous monitoring, you can purchase a hygrothermograph. A hygrothermograph is a monitoring device that is placed in a storage area to monitor and automatically record temperature and humidity at certain intervals of time. These are also available in digital form from the different companies like the Onset HOBO data loggers. Bottom line, make sure you have reliable readings and are comfortable using the devices.

However, your equipment doesn't have to be complex or digital and you don't have to have software to track. If you combine readings from your reliable inexpensive thermometer and hygrometer, you can simply create your own log and chart the findings. Write down the temperature and humidity readings at a few intervals every day for several weeks.

Once you have your data, you can see trends in the climate. Do you have humidity spikes? Are there certain times of day where you have an increase in temperature do to the sun on the building? Are there dips in humidity in the late afternoon? Once you know what the storage environment is like, you can make better decisions about storage and making adjustments to the climate.

**Be sure to remember to monitor climate in all your storage areas!**

NOTES:

## Storage Equipment Fact Sheet

The storage equipment that you use in your storage areas can also affect the preservation of your collections. Storage furniture can produce by-products that react to create damaging chemicals in the presence of moisture and oxygen. This can be a serious problem in map cases, file drawers, locked bookcases, or exhibit cases. Historical materials stored in closed cabinets should always be protectively enclosed.

**Shelving:** If possible, use heavy 18-gauge steel shelving with a baked enamel finish. Avoid wooden shelving and wooden materials around archival materials. Wood contains pitch, resin, and other acidic elements that can cause deterioration of historical records. If you must use wood, make sure that you seal it with latex paint, air-drying enamels, or moisture-cured (also called “moisture-borne”) urethane.

Make sure the floor can handle the weight of the fully loaded shelving. You don’t want the floor to cave in! You can have an engineer or someone with expertise in building construction check the shelving and weight ratios for the floor area.

Shelving should have adequate support; be grounded to the floor bolted to adjacent units and to the floor so it is stable. Shelving should also:

- Have back and side braces
- Have adjustable shelves
- Be 12 inches away from outside walls
- Have the bottom shelf elevated 4 – 6 inches from the floor
- Have two inches of clearance between the bottom of the shelf and the top box on the next lower shelf.

**Cabinets:** Filing cabinets are not the best storage equipment for historical records. They are best used in reference areas for non-historical materials that are frequently accessed. If you must use filing cabinets to store historical materials, make sure that

- The records are supported by the file cabinet equipment, or by sturdy spacers that will support the records (they shouldn’t be slumping or curling)
- There is no chipping or peeling of the cabinet finish

**Oversize cabinets:** Oversize materials can be awkward to handle and store. Consider the following when housing large drawings and other rolled or sheet materials:

- Drawers for oversize materials should be no more than 2 inches deep
- Drawers should be filled only half full
- Map cases should have flexible cloth dust covers

Materials that are over 36 x 48 inches should generally be rolled ON, not in, tubes and secured with acid free ribbon.

**Material developed by the NY-OH-MI archival education group in 2004. Reprinted with permission.**





State of North Carolina  
Department of Cultural Resources  
Division of Archives & Records

## **Western Regional Archives Reference Room Rules**


The Reference Room of the Western Regional Archives provides public access to archival collections relating to western North Carolina. Use of these records is restricted to the Reference Room area. The following regulations are intended to provide equal access to all patrons and ensure the protection of the region's documentary heritage for future generations.

1. Briefcases, tote bags, large purses, ring notebooks, envelopes, plastic sleeve-covered pages, original maps, manuscripts, and other material considered inappropriate may NOT be taken into the Archives Search Room.
2. Admission to the Search Room is by means of registering at the reference desk. All researchers must complete a registration card on their first visit. On subsequent visits researchers need to check in at the reference desk in the search room.
3. Researchers shall request records by means of completing a call slip that includes the patron name and collection title.
4. Several records may be requested at once; however, only one box, up to three volumes, and, in some instances, only one folder or item will be issued to a researcher at one time.
5. The following rules MUST be observed:
  - PENCILS ONLY, no pens or markers are allowed in the Search Room
  - Manuscripts may not be marked folded, defaced, or altered and should be carefully handled
  - Pencils are NOT to be used as "pointers" or place markers
  - Tape and Post-It notes are not permitted
  - Manuscripts, volumes and reference books should remain flat on the table and should not be held in the lap or propped against a table edge

- Only one folder is to be removed from a box at a time, and the place of that folder is to be appropriately marked with a pink place marker (obtained at the reference desk)
  - Papers are not to be rearranged for ANY reason. If something appears to be out of order, please notify an archivist
  - Smoking, food and drink are strictly prohibited in the research area
  - Researchers wishing to leave the Search Room temporarily must return original records to the reference desk
6. Researchers may be limited to 50 xerographic copies per day depending on the day's workload and number of staff available.

**The Search Room is under electronic surveillance.**

## Western Regional Archives Patron Registration Form

 <p style="font-size: small; margin: 0;">For Office Use Only:</p>	First Name	Middle Initial	Last Name		
	Driver's License Number OR State Issue ID				
	Street Address				
	City		State	ZIP Code	
	Purpose of research: (please circle one) Historical   Genealogical   Photo   Other			Affiliation: (business, academic institution, organization, etc.)	
	Phone Number		Email Address		
	I hereby agree to abide by the rules and regulations for the use of the records and materials in the Western Regional Archives as set forth in the Search Room Rules and Procedures (as set forth in Title 7, Subchapter 4M of the NC Administrative Code for the Department of Cultural Resources Archives and History Division)				
	Date		Signature		

## Western Regional Archives Sample Call Slip



# Call Slip

**Collection Number (Box and Folder etc.)**

**Name of Collection**

**Today's Date**

**Patron Name**

**Staff use Only**