

“The World Turned Upside Down”: Reference Priorities and the State Archives

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TWO HUNDRED YEARS AGO this October, the British army under Lord Cornwallis marched dejectedly from the breached defenses of Yorktown, Virginia, to surrender to victorious Americans and their French allies. The vanquished British marched out to an old tune called “The World Turned Upside Down.” Just as the name of this tune succinctly symbolizes that defeat of the British, so state archives and other record repositories throughout this country have in recent years come under siege by a determined and persistent legion known collectively as family historians, or genealogists. Often, virtual battle lines have been drawn between genealogists and archivists, as each group has seen the other as the major obstacle to accomplishing mutually exclusive goals. Considerable tension and misunderstanding has resulted on both sides. More recently, with the flow of genealogists to our doors showing no signs of abating, some archivists have begun to examine seriously the question: How do we help the genealogist in the use of archives? Not only are archivists finally willing to acknowledge the presence of genealogists, but one recent regional archives meeting even devoted a session to investigating how we might *educate* them. I would contend that before we undertake the education of the genealogists, we must first re-educate ourselves.

Let us backtrack a bit to recall the part genealogists have played in establishing

American state archives, particularly in the Southern and mid-Atlantic states, with special reference to Maryland. In 1901 Alabama established a state archives, the first state to do so. Thereafter, the states in varying manner and at different dates established their archives. In this they were greatly aided by genealogists (many of whom peopled the patriotic societies) and by local historians who recognized the necessity of American state archives. In Maryland, the American Historical Association in 1902 urged that a study be made of the scattered archives of the state; and with this the idea of a central archival depository was formulated. The tercentenary celebration of the settlement of Maryland gave the actual impetus needed for the creation of a central depository for its archives. The Maryland Hall of Records opened in 1935. Not only the politicians, but individuals throughout the state, proud of their ancestry and anxious to have their heritage preserved, gave substantial support to the movement for a state archives.

Now, every archivist has been trained to believe that the primary responsibility of any governmental institution is to the body that created it. Ernst Posner said of archives, in his *American State Archives*, that “service to government and its various units and subdivisions must take precedence over all types of reference services” (page 360). Archivists have learned this lesson well. No matter how pressed archi-

vists are, requests from government officials or the courts must be attended to immediately. And generally they are.

After state officials, historians are the preferred customers of the typical archivist. This is true partly because in helping historians archivists find they are able to add to their own knowledge of a given subject. Even though the historian requires much attention, archivists derive more intellectual stimulation and, it must be admitted, ego satisfaction, from helping the historian than the genealogist.

The archivist of a large religious institution, whom I know well, says that genealogists are the most selfish of all people and that some of his fellow religious are morally opposed to aiding any of them. The same attitude, expressed in secular and occasionally outright vulgar terms, is shared by most archivists in public archives.

Denigrating genealogists has been a cherished avocation of archivists ever since we began scratching our way up the ladder toward professional status. An archives was not for genealogists, and only the few who in no way interfered with work of the professionals were truly welcomed within the portals. Genealogists were given no special encouragement or assistance, and younger members of archives staffs were warned: "Do not spoon-feed genealogists." This attitude was particularly true outside the deep South.

There are reasons for the attitude, of course. In the past, the average genealogist was perceived as a wealthy, conservative, super-patriot who simply wanted to impress others with his own notable ancestry. His interest often was narrow and selfish, and he had no training in the methods of historical research; the archivist too often had to do much of the work.

Because of the sharp increase over the past few years in the number of genealogists coming to our archives, we know now that genealogists, like all people, come in different shapes, sizes, and complexions, representing all classes, races, and religions. Whether motivated by personal pride, simple curiosity, or the need to establish roots in a mobile society, their

reasons for wanting to research their personal histories are not criteria that we can legitimately question or dismiss. Genealogists, then, have as much right to use our archives as anyone, and we have a duty—a responsibility if you will—to make our records available to them.

One might even argue that our former priorities must, as in the British song, be turned upside down. The typical historian in our archives, rather than deserving special attention from us, is at least as self-centered as the average genealogist; and today most topics investigated by historians are so narrowly defined and so obtuse as to be of little or no value to anyone. We, along with other government officials and agencies (long our most valued clients), have forgotten that they, like us, are supported by the taxes of the state's citizens and that all facets of government, from the governor's office and the state's highest court on down, were established to serve the people. Is it justifiable or prudent to expect genealogists, taxpayers and citizens all, who comprise one half to more than three quarters of our clientele, to stand patiently in line while we first serve fellow public servants and superfluous historians?

Even if we are willing to acknowledge the validity of research undertaken by genealogists, and fully recognize the importance of their numbers to our archives, we are still faced with serious problems caused primarily by the great increase in their demands. Last year, nearly 13,000 researchers visited the search room at the Maryland Hall of Records. They sapped our resources and forced us to concentrate staff time and energy mainly on them, not on other duties we perceive as part of our mandate. Granted, the size of our staff has increased over the past decade, but only slightly and not nearly in proportion to the increased demands for service in person or by mail. Moreover, our facilities have not been enlarged, and our other duties have increased. We must do far more than run the research room, a fact of which the researcher is seldom aware. Every year we have accessioned records, prepared exhib-

its, written, published, edited, lectured, and taught. These accomplishments notwithstanding, our archival staff spent 75 percent of its time in the research room or in answering the almost 8,000 genealogical inquiries we received during the year. Most would agree that this is a disproportionate amount of time to spend on a single segment of our clientele. A few years ago it became clear that we had to do something about the sheer volume of demand placed on us by genealogists—not to discourage or penalize them as a group, but to improve the way we handled their inquiries so as to satisfy their needs as efficiently and expeditiously as possible.

The rise in correspondence was one of the first problems we faced as a result of the increased interest in genealogy. The volume of mail became so great that we were forced to adopt drastic measures to cope with it.

In 1975 we began charging \$5 for each inquiry, and we guaranteed an hour's worth of research. We did not seek to discourage written inquiries, but rather to reduce the number of people simply fishing for information. We can best serve those writing to us if their questions are concise, coherent, and to the point. The \$5 search fee was no deterrent to our correspondents, and the quality of inquiries we receive has markedly improved.

Next, we installed text editing equipment capable of storing scores of standard paragraphs. Archivists can assemble a letter quickly by inserting a variety of standard stored paragraphs in combination with brief statements that answer specific portions of any inquiry received. Despite our small staff and large volume of mail, this use of new technology enables us to respond to most correspondence within three weeks, without resorting to the frequently irrelevant and often annoying form letters we once used.

Our second problem was to devise means to deal more effectively and efficiently with the 10,000 genealogists each year who come to the archives to do research themselves. First, we rearranged our research room to accommodate more patrons, replacing the old rectangular

search-room tables with more efficient octagonal research stations. Then, we developed new tools to aid researchers. Each new researcher is given an orientation packet consisting of security instructions, a diagram of the facilities, and maps of the Maryland counties and of Annapolis. The Maryland map cites the date each county was established and the names of the parent county or counties. Also included is a leaflet describing our genealogical holdings and a brochure listing our publications.

Research in any archives is vastly helped or hindered by the quality and quantity of available guides, tools that every researcher must employ. Although every volume or item in an archives is eventually accessioned and entered on a shelf list, these lists, until very recently, were generated for internal use rather than for public perusal. Therefore, those who came to use the facilities had to have a catalog, calendar, or some other guide that would give direction to their search. Our agency, over the years, has developed such guides, but we do not have nearly enough. We are now in the process of compiling new ones. Computers will make the work much less expensive to publish, but the time to compile the data is in increasingly short supply. We find ourselves faced with a dilemma: the rapidly increasing number of genealogists coming to us for help need readily accessible guides and finding aids if they are to spend their time with us productively. Yet, the staff time needed to develop these necessary tools is being diverted to the search-room and to answering correspondence, just to keep abreast of current demand. The solution to the problem would be a sharp augmentation in the size of our professional staff or a radical reduction in the number of people seeking information, neither of which seems likely to occur.

Furthermore, ~~guides themselves are not really the answer~~. All researchers, and particularly genealogists, need instruction in the use of guides if these tools are to be most effective. Only the so-called professional genealogists, who come to use our facilities day after day, know our set-

up. Most people who visit our archives are totally unfamiliar with archival arrangement. They may be able to use a library with its subject indexes and author-title catalogs, but archives are not arranged that way. In short, we must find better ways to help genealogists tap unfamiliar resources in our archives.

The Hall of Records, for instance, has a large quantity of loose state-papers dated 1775–89 and over 30,000 microfilm reels of county records. We needed a guide for both series of records, but to place papers in physical order and accession the backlog of microfilm seemed, with the size of our staff, an impossibility. We needed a guide to both series; so we left the loose papers in random order, summarized the contents of each document on a standard sheet, keyboarded the information on an in-house text editing system, and allowed the computer to sort the records into chronological sequence and produce for us an author-recipient index. Included in this guide were three other indexes, consisting of two of our card files and the published catalogs of what we term the *Rainbow Series* of records. It is perfectly true that the new guide brings under archival control all our loose documents of the Revolutionary Era and provides access to many new materials for use by researchers. It represents a monumental archival achievement, and it is of great help to the scholar. The genealogist, however, has little use for it. Nothing has taken the place of the former indexes, which included all names on the document as well as subject indexes. It is not that we did not understand what the genealogist needed, but rather that the cost of computing and the limits of the computer made the kind of index most desired by genealogists impossible.

Our microfilm guide, published two years ago, fared better in this respect. The guide is arranged by county court and record series, with title of record, date of record, and accession number given. The headings or subject indexes are those with which the layman is totally familiar: marriages, land records, births, deaths. This guide is constantly used and circulated.

One of our success stories is the rearrangement of our index cards, cards that take up our whole index room and are used most heavily by the genealogists. The problem with these indexes was inherited. The indexes to our various record series had not been placed in any logical order. Researchers spent a great deal of time looking for a particular index, since there was no guide. Two years ago we closed the archives and completely rearranged the indexes. When we finished, the marriage indexes were together and our indexes to military records followed in chronological sequence beginning with the colonial wars and ending with the Civil War. The index to each series is indicated by an Arabic number on the first drawer of the series, and the series continues until another number is shown on a drawer. When a person enters our search-room, along with security instructions, maps, etc., he or she is given a six-page leaflet, keyed to the Arabic numbers on the drawers, describing our card indexes.

Despite all these changes, it is still true that nothing, literally nothing, can take the place of personal instruction. The heart of any archives is its research room and the staff who work there. It is this staff, in constant contact with the public, who must instruct the beginner and advise the user. This is the key to the future in every archives: the personal instruction of the researcher. I can hear protests: "But there is no time, no staff." There is more than one way to instruct. Talks to groups of concerned researchers, at genealogical clubs, patriotic societies, educational meetings, or at schools bring amazingly grateful responses (except from the old lady in the front row who falls asleep, or the school child interested only in outwitting the speaker).

At the Maryland Hall of Records we are beginning a new program of regularly scheduled walking tours of our archives each day, Monday through Saturday. We hope thereby to bridge the gap between existing sporadic and inconsistent individual instruction and the available, frequently inadequate printed guides and finding aids. The tours, lasting about an

hour, will be specifically geared to the needs of the genealogist. With this program we hope to assist the large number of first-time patrons, and to cut down on the number of individual requests for instruction, resulting in a net saving of staff time.

To summarize:

As professionals, our attitude toward genealogists must change. In addition to recognizing the fact that they constitute the largest body of those who use our archives, we must also realize that they are our staunchest supporters.

We must train genealogists in the art and mystery of archives, and our best chance of doing this will not be by guides alone, but rather through personal instruction.

It is said that when Roosevelt died and the Vice President was told, Truman turned to Sam Rayburn and said, "Sam, I can't do it."

"But," the older man replied, "you've got to."

Maybe that is our answer. We've got to change our attitude, welcome the genealogists, and face the problems they bring to our profession as our greatest challenge, a challenge that will bring a new vitality and dimension to state archives.

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Reading Room, Maryland Hall of Records. *Photograph by and courtesy of Ed Papenfuse, Maryland Hall of Records.*