

Guidelines for Developing a Core Genealogy Collection

[Back to Guidelines by Topic \(http://www.ala.org/rusa/guidelines-resources/guidelines-by-topic\)](http://www.ala.org/rusa/guidelines-resources/guidelines-by-topic)

Prepared by the Genealogy Committee of the History Section of the Reference and User Services Association 1991, Revised 1999 and 2007. Approved by the RUSA Board of Directors June 2007.

1.0 Introduction

- 1.1 Genealogy has become an increasingly popular pastime and hobby in the United States. Many genealogists are seeking information on the origins of their ancestors from published and original sources. Public libraries have a responsibility to service the needs of patrons interested in genealogy research by providing basic genealogy reference materials in print, microform, and digital, and how-to-do-it books in the library. Access to additional genealogy research materials through interlibrary loan or referral are necessary in providing complete genealogy reference services. Other libraries that wish to develop a genealogy collection and provide services may find these guidelines useful, as well.
- 1.2 These guidelines address services, collection development, personnel, access, preservation, and fiscal considerations for genealogy services. They are intended to assist those who desire to create a core genealogy collection and provide basic genealogy services in order to meet the above-mentioned responsibilities, the American Library Association's Library Bill of Rights, and the markedly increased public interest in genealogical research.

2.0 Services

- 2.1 Genealogy reference service should include, but may not be limited to, assisting and instructing genealogy patrons to determine what research materials may help them, evaluating the significance and validity of various types of information, locating research materials through print and digital data sources and services, and providing access through interlibrary loan, rental services, or referring genealogy patrons to other known libraries, institutions, agencies, and archives that have particular genealogy research materials that may be able to help them.
- 2.2 When necessary, genealogy patrons or their questions should be referred to system or network resource centers, or to archives, government agencies, or libraries when the referring librarian knows that the needed research material, that cannot be provided by the library through its own collection or interlibrary loan, is available.
- 2.3 If a specific genealogy reference service cannot be provided, the library's general reference service should include assistance for genealogy patrons.

3.0 Collection Development

- 3.1 Genealogy collections should begin with available local history materials and local records for the community which the library services. As funds allow, collections should branch out to include materials for the county, state, border states, and states along the migration patterns leading into the state.
- 3.2 Genealogy collections should include: family histories and genealogies of local families; pedigrees and/or compilations of family group sheets of local families (originals or copies thereof); vital records when available; federal and state census for the local community; probate and will records; land records; county, city, and state maps; cemetery records; information on local churches; naturalization records; military records; local newspapers; county histories; and indexes to the preceding items. The items may be available and provided in various formats, including microform, print, and digital. Collections should also include manuals and handbooks of how to do genealogy research.
- 3.3 The genealogy collection should be developed and maintained to support the basic research needs of the community serviced by the library. An assessment should be made concerning the ethnic background and countries of origin of the members of the community serviced by the library in order to determine the scope of the genealogy collection. The scope of the collection should represent, at least, the majority of the community but not be limited to it. The collection should include basic materials on genealogy research procedures . These materials should include the widest possible range of nationalities and ethnic groups represented in the community.
- 3.4 Cooperative collection development should be considered when other genealogy collections are available locally to the public without charge.
- 3.5 Materials selection can be assisted by using basic annotated bibliographies of genealogy sources, reviews in library and genealogy journals, and reviews provided in authoritative digital sources. ⁱ

4.0 Personnel

- 4.1 Genealogy collections should be maintained by professional reference librarians. They may be assisted by para professionals. All reference librarians serving genealogy patrons should be trained and periodically updated in genealogy research. This may include, but not be limited to, attendance at local, state, regional, and national genealogy or library conferences (including pre-conferences), seminars, or meetings where genealogy research procedures are presented, or through home study courses. ⁱⁱ
- 4.2 Reference librarians should be trained to assist genealogy patrons with evaluation, search techniques, protocol, and use of digital data sources and services related to genealogy research.

- 4.3 The responsibility of referring genealogy patrons to archives, government agencies, and libraries requires that the trained reference librarian also know about the centers where genealogy resources are maintained. The collections and holdings of local genealogy and historical societies should be familiar to library staff.
- 4.4 Knowledgeable genealogy research volunteers may be utilized to supplement reference service provided to genealogy patrons by the reference staff but should not replace it.

5.0 Access

- 5.1 Genealogy materials should circulate, including on interlibrary loan, unless the materials are rare, are considered to be reference materials, or are in great local, daily demand.
- 5.2 Bibliographies or guides to reference, circulating and digital genealogy materials and sources should be provided to enhance ease of access.
- 5.3 The acquisition and cataloging of genealogy materials should receive the same priority as other library materials.

6.0 Preservation

- 6.1 Many genealogy and local history materials are old and fragile. The genealogy staff should be trained in basic book repair techniques. Proper humidity should be maintained to provide longevity of fragile books. ⁱⁱⁱ
- 6.2 Many genealogy and local history materials are one-of-a-kind and irreplaceable. Care should be taken with their placement in the library. A secure environment is advised in this case.
- 6.3 Local history materials may be preserved in a digital format. Updates of digital materials will need to be maintained.

7.0 Fiscal Considerations

- 7.1 A budget should be provided sufficient to acquire, process, maintain, and staff the genealogy collection.
- 7.2 A budget should be sufficient to provide physical and bibliographic access to the collection.

7.3 A budget should provide for reproduction and reformatting of rare and fragile materials.

7.4 A budget should provide for access of genealogy databases.

ⁱ Book reviews of new books, and often genealogy software, can be found in Everton's Family Tree Magazine, National Genealogical Society Quarterly, Ancestry, Federation of Genealogical Societies Forum, Heritage Quest, and journals of regional and state interest. The Handybook for Genealogists has bibliographies of resources listed by state.

ⁱⁱ Training can be obtained at the following institutes: Genealogical Institute of Mid-America <http://www.rootdig.com/gima.html> (<http://www.rootdig.com/gima.html>) , National Institute on Genealogical Research <http://www.rootsweb.com/~natgenin> (<http://www.rootsweb.com/~natgenin>) , and Samford University Institute of Genealogy and Historical Research <http://samford.libguides.com/ighr> (<http://samford.libguides.com/ighr>) . The National Genealogical Society and the Federation of Genealogical Societies have national conferences each year. Each provide a preconference for librarians. Each year the Genealogy Committee of the History Section of RUSA provides a preconference at either the Mid-Winter or Annual ALA Conference.

ⁱⁱⁱ An excellent source for information on preservation can be found at <http://www.librarypreservation.org/preservation/index.htm> (<http://www.librarypreservation.org/preservation/index.htm>)