

“Without libraries what have we?
We have no past and no future.”
—Ray Bradbury

Evaluation of Texana/ Genealogy

for the
San Antonio Public Library

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EXECUTIVE SUMMARY

The San Antonio Public Library (SAPL) provides residents and visitors a wonderful resource to explore unique and valuable collections and services in Texana/Genealogy to benefit their lives, their families, and future San Antonians. These collections are a wellspring of community identity—though relatively unknown and underutilized. This report provides strategic recommendations to reveal the value of these hidden collections, to revitalize public engagement, and to showcase the Library's most important cultural heritage resources, making them a foundation of civic pride.

Reasonable questions, feasibly on the minds of Library administrators, and perhaps some local taxpayers, are:

- “Does the mission of Texana/Genealogy align with the mission of the Library?”
- “Aren't academic libraries and other organizations better equipped to be the keepers of our community's history?”
- “What are the benefits of maintaining and providing access to Texana/Genealogy resources?”

Answers to these questions follow in the Executive Summary and are further discussed in the details of the report.

A once booming area when it opened during 1995 in the SAPL Central Library, Texana/Genealogy has experienced a steady decline in visitors during the past 20 years. SAPL was one of few Texas libraries to hold the U.S. Federal Population Census for all states since the first enumeration in 1790 and family historians flocked to Texana/Genealogy to take advantage of this grand resource. To better serve these patrons, Texana/Genealogy developed a significant genealogy collection of books and periodicals. Simultaneously, acquisitions for the Texana collection strengthened the state and local historical reference resources and assembled strong holdings in Texas newspapers, Spanish records, Civil War documentation, and materials covering other subject areas.

Today, online subscription databases available via the Library's website almost entirely supplant the need for the microfilm of the Federal Census. Other history and genealogy resources available on the Internet also have impacted in-person use of Texana/Genealogy resources. Where the Library's Texana/Genealogy collections may have far better resources for some patrons' needs, the collections are not available (or are not discoverable) on the Internet. The Library has done an excellent job in keeping pace with the 21st century information environment; however, Texana/Genealogy was not included in this technological transition, which is one explanation for its struggle to retain visitors.

Implementing the mostly low and no cost recommendations outlined in the following report will improve Texana/Genealogy's public presence and better inform prospective patrons about the collections. The more costly recommendations have clear benefits; however, these may be selectively deployed as library budget and goals direct.

“Does the mission of Texana/Genealogy align with the mission of the Library?”

The SAPL mission statement is charged with impact that focuses on people:

The San Antonio Public Library changes lives through the transformative power of information, imagination, and ideas.¹

The Texana/Genealogy mission is not unlike the mission for many special collections since the 1980s, focused on function and scope:

The Texana/Genealogy Department acquires, preserves and offers access to research materials relating to San Antonio, Bexar County and Texas history, and North American and Hispanic genealogy.²

Aligning the Texana/Genealogy mission with the SAPL mission could be a simple adaptation of archives advocate and educator Kate Theimer's suggested mission: "Archives add value to people's lives by increasing their understanding and appreciation of the past."³ For example:

Texana/Genealogy adds value to people's lives by increasing their understanding and appreciation of their ancestors and the San Antonio region's past.

This simple change not only focuses attention on *why* Texana/Genealogy acquires, preserves, and provides access to the historical and genealogical resources, but grounds these efforts with meaningful outward-looking emphasis, just like the SAPL mission.

"Aren't academic libraries and other organizations better equipped to be the keepers of our community's history?"

Most academic special collections primarily serve the faculty and students at their institution by collecting research resources that support the school's curriculum. It is not uncommon for these special collections to collect community history resources; however, the scope of their collection development efforts is normally narrow. Most academic special collections allow the general public access to their resources; however, reading room hours may be limited.

Academic special collections typically do not take the role of custodians of a community's history. UT San Antonio is an exception: "The University of Texas at San Antonio Libraries preserve the legacies of San Antonio and South Texas through Special Collections featuring a rich array of primary resources."⁴ UTSA's John Peace Library Reading Room for Special Collections currently is open only by appointment. The Reading Room was open only 15 hours per week when they did have regular hours of operation.⁵

Sometimes the custodial role for community history rests with local history museums, yet these worthy organizations usually are not equipped to facilitate research, like a public library with its trained staff of librarians and archivists. Museums frequently focus on artifacts and how they can be used to convey historical context. Museums have curators whose primary function often is creating interpretative exhibits—refining history in a manner that is engaging and easily understood. Curators also conduct research and develop educational programs. Librarians and archivists are specialists in providing high-level reference assistance to scholarly researchers and the general public—something that most museums are not able to offer.

The forthcoming Bexar County History Center appears to potentially provide "an archive, research and service center that serves the needs of researchers and scholars . . . ensuring that local historical resources (including both documents and artifacts) are identified, collected and preserved appropriately."⁶ Books, periodicals, and microfilm are not mentioned in the *Report of the Blue Ribbon Commission for a San Antonio/Bexar County History Center* regarding the prospective Center. Bexar County Clerk Gerald C. Rickhoff has stated that "he has the funds to digitize the complete [Texana] collection so as to make it available to the public seven days a week."⁷ This undertaking "would require an inventory and feasibility study of the collection to determine a scope of work and procure a vendor to perform the tasks."⁸ Regarding the costs for digitization, "The Bexar County Clerk's Office is considering providing some funding from our Records Management Fund. Depending upon the cost and type of activities needed to

be conducted, additional funding sources will need to be identified.”⁹ Clarification is required regarding the use of recording fees for records preservation and how they may, or may not, be used for digitization.¹⁰

Under current and foreseeable circumstances, SAPL remains the most suitable custodian of research resources and reference services on Texana and genealogy for the San Antonio region because of its important collections, its educated and experienced staff, its extensive public accessibility, and its mission of public service.

“What are the benefits of maintaining and providing access to Texana/Genealogy resources?”

Texana/Genealogy is ideally suited to provide the general public expert librarian assistance and research access to rich historical and genealogical resources during daytime, evening, and weekend hours. This establishes that SAPL *can* provide specialized reference assistance within its collections, but *should* this continue as a role for SAPL and will the public value it?

Direct Benefits

Patrons who derive direct benefits from Texana/Genealogy resources include those who know about and use the resources on-site and online, those who attend classes and programs, and those who attend organizational meetings when staff members present programs about the collections. The in-person visitor numbers have diminished over time, but these could be invigorated with improvements to the website and catalog, targeted marketing, and creating value-added content. One online collection, the African American Funeral Programs, has seen more than 132,000 visitors since it was launched in 2011.¹¹ This is an excellent example of how unique collections can reach a wide audience when they are available on the Internet. Special collections are wise to focus on digitization as a way to engage the 21st century library patron.

Since 2000, authors and content creators identified Texana/Genealogy as a source for more than 200 articles, blogs, books, reports, videos, and websites (see [Appendix 1](#)). This is just a sampling—an untold number of products derived from Texana/Genealogy resources still remain to be identified. The readers and viewers of these writings and recordings are beneficiaries of the research conducted in Texana/Genealogy, with SAPL receiving recognition for holding the unique book, document, letter, map, or photograph that informed the research.

According to the *Report of the Blue Ribbon Committee* referenced above, “San Antonio is the most historic city in Texas.”¹² This is perhaps most evident to residents and visitors in the historic architecture of the city. Many of these historic structures are on the National Register of Historic Places, are Registered Texas Historic Landmarks, and/or are eligible for the Historic Preservation Tax Credit Program. Looking at just one historian’s work since 2000, 27 historic buildings are in one of the above categories because of reports based on research in Texana/Genealogy holdings. An additional 10 Historic Sites and Structures Assessments and Reports and 11 exhibits and interpretive signs also were products of research this historian conducted in the collections (see [Appendix 2](#)).

Indirect Benefits

In many ways, San Antonio communities owe a great deal to SAPL for helping historians and archaeologists protect their architectural legacy. According to the Texas Historical Commission, “Historic preservation is a fundamental strategy for economically, socially and environmentally healthy communities.”¹³ The economics of historic preservation are evident in San Antonio’s significant heritage tourism industry. Total Direct Travel Spending for the San Antonio metropolitan area approached \$8 billion in 2013, and generated an “equivalent to \$900 in tax revenue for each Texas household.”¹⁴ Through these taxes, out-of-town visitors to Texana/Genealogy directly contribute to the City of San Antonio’s budget, just as San Antonio’s residents do—visitors have a positive fiscal impact on San Antonio that cannot be denied.

Recommendations

Texana/Genealogy is an excellent collection with enormous potential. The Library has the opportunity to shine and to connect communities with their cultural heritage via public programming; publishing blogs, books, and videos; and assisting patrons to do the same. Nationally, SAPL is in the enviable position to have amassed published and unpublished historical resources that can reveal intriguing stories about the region and the public that the Library serves. These resources must be promoted, and the public must be reminded that SAPL is the home for their community history. No other local organization can undertake this responsibility with better-qualified expertise or professionalism.

SAPL has the chance to establish the Library as the guardian of the region's documentary heritage and to revitalize public interest in their local and family history. The glory is not only in saving the historical record of the citizenry, but also in empowering interpretation, debate, and understanding. Among the recommendations in this report is a day-long public symposium at the Central Library during 2018 to commemorate the 300th anniversary of the founding of San Antonio. This is the first of many annual events that will elevate SAPL in the leadership role to ensure that the region's history is accessible and remains a vital part of San Antonians' lives. Based on the papers presented at the symposia, books published by the Library will codify the history and contribute to further investigation and scholarship. SAPL will curate *and* create historical content—a transformative role for libraries in the 21st century.

The success of Texana/Genealogy depends on making many small improvements, a few significant changes, and most importantly, success hinges on Texana/Genealogy becoming a strategic priority.¹⁵ SAPL has already made the most critical investments in Texana/Genealogy—through decades of collection development, targeted staff training, and building excellent community and patron relationships. What work remains primarily will focus on increasing and sustaining public awareness of the collections, improving security and preservation efforts, and refining the use of the physical space.

Each of the 38 recommendations in the report is identified with a proposed month and year for implementation and an estimate of direct costs. Specific services and products are recommended based on the consultant's experience or knowledge at the time of writing this report. These services and products should be considered examples, and SAPL is encouraged to determine if alternatives will better suit the Library's specific needs at the time of implementation. Estimated direct costs are intended as approximations to help triage budgeting priorities. Actual costs may be higher, or lower, when recommendations are actually employed. Indirect costs, including labor and other SAPL-provided services (IT, Facilities, Public Relations, etc.), are not included in the recommendations.

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COLLECTIONS

Even before it was established in 1995, Texana/Genealogy set its sights on becoming a nationally recognized Texas history and genealogy research collection. A leading genealogy journal, *Heritage Quest*, profiled the collections shortly after opening at the Central Library in 1995:

The Texana Genealogy Collection of the San Antonio Public Library provides researchers with an impressive aggregation of materials. With estimates of nearly 25,000 book volumes, and some 200 genealogical and historical periodical subscriptions, the San Antonio Public Library has made a definite commitment to serving the research needs of genealogists and historians.¹⁶

The article enthusiastically provides details about the holdings, emphasizing the “excellent collection of Mission records,” Hispanic, Jewish, and African American materials, early American newspapers, “a wonderful array of Civil War records,” and a “fabulous assortment of Texas records on microfilm.” The article ends with the comment, “This is some collection. If you are ever visiting this part of Texas, a sojourn to San Antonio Public Library’s Texana Genealogy Collection is a must.”¹⁷

Today, 20 years later, the research collections have expanded to 75,000 books, 60,000 microforms, 300 cubic feet of archival collections, and 110 drawers of archival files.¹⁸ The Texana/Genealogy collections comprise five distinctive collections: Texana; Genealogy; City Documents; Archives; and Special Collections.¹⁹ Each collection is described below, followed by recommendations.

Texana Collection

The Texana Collection is geographically focused on “the history and development San Antonio and Bexar County. . . Texas, the Southwest, and Northern Mexico,” and ranges in time from prehistory to the present. Broad subjects include archaeology, culture, history, natural resources, and wildlife. Formats include archival collections (discussed below), books, maps, microforms, and serials, in English, Spanish, French, German, and Yiddish. One third of the annual acquisitions budget is allocated for purchasing Texana materials.²⁰

Newspapers, on microfilm and in hardcopy, are a superior part of the Texana Collection. Some titles are not available anywhere else and are vital for historians researching a variety of subjects about the region.²¹ Microfilming has ceased due to a lack of funding and hardcopies are stored in the Texana stacks.²² This is a precarious situation for the long-term preservation of and access to these materials. Titles that currently require microfilming include: *Daily Commercial Recorder*, *Jewish Journal of San Antonio*, *La Prensa*, *Rumbo*, *San Antonio Business Journal*, *San Antonio Current*, *San Antonio Informer*, *San Antonio Observer*, *San Antonio Register*, and *Today’s Catholic*.²³

Comprehensive subject strengths of the Texana Collection include: the border with Mexico; food and cooking; regionally set fiction; Texas county histories; Texas Rangers and law enforcement; and water resources and statistics. The Collection also has wide-ranging content in: Affirmative Action; Alamo; American Indians of Texas; architecture; art and artists of the West; agriculture and livestock; Civil War; dance; Hispanics; education; energy and oil; film; folklore; industry and economics; Kennedy assassination; labor; literature and poetry; Mexican Revolution; military; music; natural history; outlaws; photography; politics; religion; social and fraternal organizations; sports; Texas Revolution; transportation; U.S.-Mexican War; women; and World Wars I and II. Some other unique items include the *Construction News Bulletin* from 1920–2006 and *San Antonio Express-News* indexes.²⁴

Genealogy Collection

The Genealogy Collection is geographically focused on “every state east of the Rockies . . . as well as Canada, Mexico, and some European countries.”²⁵ The bulk of these research resources are 19th and 20th century content, with some 17th and 18th century content about slavery, military discipline, and the population of New Spain. Broad subjects include county histories, church records, family genealogies, military records, and passenger lists. Formats include books, maps, microforms, and a robust serials

collection with approximately 200 subscriptions (an additional 200 serials titles were acquired by exchange for *The Explorer* journal, which was published by Texana/Genealogy and discontinued in 2014). Two-thirds of the annual Texana/Genealogy acquisitions budget is allocated for purchasing genealogy materials.²⁶

A Sourcebook for Genealogical Research: Resources Alphabetically by Type and Location identifies Texana/ Genealogy as one of the leading libraries for Hispanic genealogy research in the United States: "Library collections of documents related to Hispanic-Americans can be seen at the University of Texas in Austin (Benson Latin American Collection) and the University of Texas Pan American Library in Edinburg; at the **San Antonio Public Library in Texas (Texana Department)** [emphasis added]; at the University of Arizona at Tucson (Documentary Relations of the Southwest), and at the University of California in Berkeley (Bancroft Collection of Western and Latin Americana)."²⁷

City Documents

Texana/Genealogy is a designated repository for City of San Antonio "annual reports, City Council packets, consultant studies, health and vital statistics reports," and other reports. Deposited items include archival materials from "the San Antonio Development Agency, San Antonio Water Board, Art and Cultural Affairs Department, Health Department, [and] Parks and Recreation Department," some dating from the "late 1800s and early 1900s."²⁸

Archives

The Archives primarily are composed of unpublished personal papers and organizational records. Oral histories are another extensive component of the archives, with interview recordings and transcripts in the following collections: American Issues Forum; Bexar County Historical Commission; Bexarenos/Tejanos Interviews; Castro's Colonies Historical Association Speakers; City Parks & Recreation & Incarnate Word; Institute of Texan Cultures; Recuerdos de mi Familia y Tejas; San Antonio Historical Association Speakers 2000–2008; Southwest Vaqueros; and Various. Even though there are lists of these interviews online (<http://guides.mysapl.org/oralhistory>), they are not discoverable by the major online search engines and are therefore essentially invisible to most offsite researchers.²⁹

As part of the San Antonio Symphony Archives, oral history interviews of "orchestra members, administrative personnel, long time supporters and Symphony Society members" are an ongoing project.³⁰ In addition to the Symphony, Texana/Genealogy holds another substantial performing arts collection, the San Antonio Theatre Archives: Records of Russell Meriwether Hughes (La Meri). This significant collection, dating back to 1900, includes "correspondence, printed materials, photographs and photo albums, scrapbooks and audio tapes chronicling the career of La Meri from her early childhood in the early 1900s through her retirement in the 1980s."³¹ There are also "55 file drawers of programs, scrapbooks, and business records of San Antonio theatrical presentations."³²

The Texana/Genealogy Archives include records documenting other arts and culture organizations, the functions of regional government, religious, and social organizations, and the personal papers of individuals and families important to San Antonio history.

Finding aids for 91 processed archival collections in Texana/Genealogy are available in Microsoft Word format from the Special Collections page under SAPL's Resource Guides (<http://guides.mysapl.org/content.php?pid=30286>).³³ Records for five of these collections are available in the SAPL catalog, and four of these five collections appear in OCLC's ArchiveGrid and WorldCat.

An additional 26 archival collections are listed as "Collections without Finding Aids," though the list may not be current as some of the collections listed also appear with those that do have finding aids.³⁴ An unknown number of collections have records in the catalog, but do not have finding aids online (e.g. Personal Research Papers of Edward L. Miller). The quantity of these collections is thought to be very few.

The 14 SAPL collections and monographs listed in ArchiveGrid were likely passively harvested from the OCLC record; however, it is possible to actively contribute archives finding aids to ArchiveGrid for inclusion. ArchiveGrid is currently still in beta testing and there is no cost to participate.³⁵

Texas Archival Resources Online (TARO) is the cooperative online source for finding aids describing collections in 36 Texas repositories. Finding aids on the full-text-searchable TARO website, hosted by the University of Texas at Austin, are also discoverable by all of the major online search engines. Currently, Texana/Genealogy finding aids are not included in TARO, nor are any of the finding aids on the SAPL website discoverable via Bing, Google, or Yahoo search engines, making them virtually hidden to potential researchers.³⁶

Special Collections

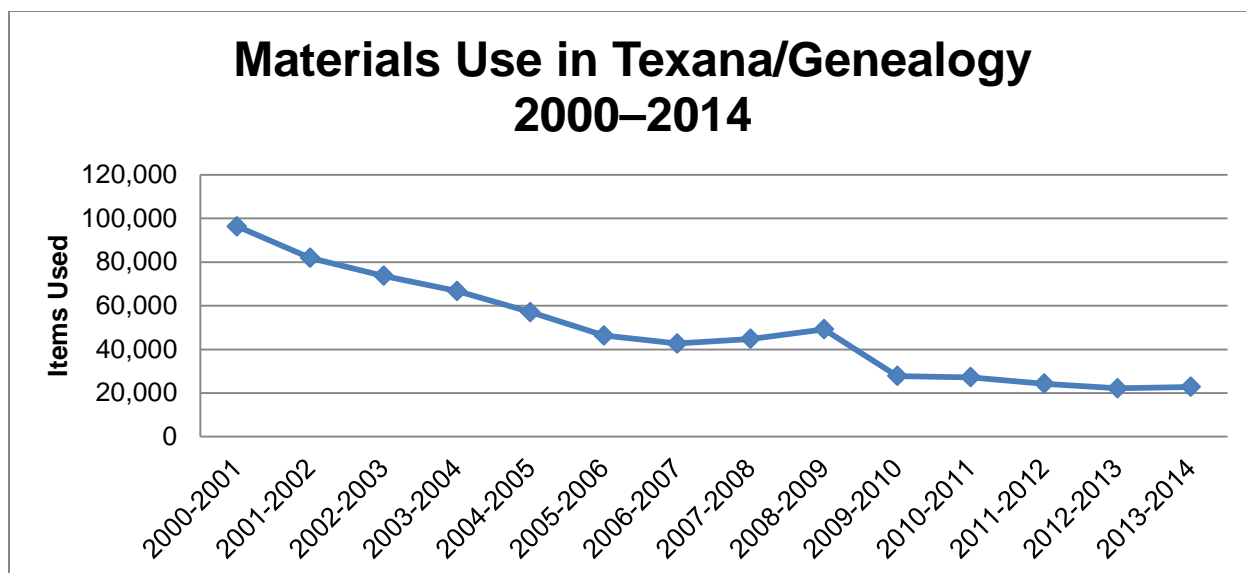
The Special Collections include rare and valuable books, examples of fine printing and binding, illuminated manuscripts, broadsides, and early newspapers. These include the: Ann Flores Collection; Birkhead Collection; Col. Martin Giesecke Collection; Edward W. Heusinger Geographical Collection; Florence and Frank Rosengren Collection; Hertzberg Rare Book Collection; J. P. Newcomb Collections; and the Mary Ellen Slayden Collection. Some of these Special Collections have little or no subject relationship with Texas or San Antonio history or genealogy, but contain mostly unique groups of items that were assembled by the collectors. Subjects include children's books, geography and travel, World Wars I and II, religious texts like the first edition of the 1611 *King James Bible* and *Biblia Latina* dated 1250.³⁷ Broadsides include numerous World War I posters, some of which are nicely framed and exhibited on the walls outside of the Texana/Genealogy area.³⁸

Approximately 125 books in these collections were evaluated by Alan and Marcy Culpin, Abracadabra Books, Denver, Colorado, during September 2014. Describing these items as “amazing treasures” and “gems,” the Culpins suggest that, “properly promoted,” some of the contents of the Special Collections “could bring considerable reputation to the great San Antonio Library.” Many of the evaluated books were published in England and Europe, with the subjects mostly about world history, Mexico, American Indians, and some with Texas significance.³⁹

Texana/Genealogy also holds five Hermann Lungkwitz paintings, currently on display, that were donated by Louis Ulrich in 1926.⁴⁰ SAPL is listed among other notable institutions that have Lungkwitz paintings: “Center for American History; Governor’s Mansion, Austin (lent by Witte Museum, San Antonio); Capitol Historical Artifact Collection, Austin; Comfort Historical Museum; Dallas Historical Society; Torch Energy Advisors, Inc., Houston; Daughters of the Republic of Texas Library, and Witte Museum, San Antonio.”⁴¹

Research Use of the Collections

Texana/Genealogy statistics indicate vigorous use of resources from the late 1990s and the early 2000s, and some tapering of use until FY2009–2010, when a steep 43.5 percent decline in materials use occurred. The decrease in materials use appears to be directly correlated to the 44 percent decrease in operating hours from 72 to 40 hours per week.⁴²



During December 2009, the genealogy collection was moved outside of the Texana/Genealogy area to permit patrons access to these resources during all of the operating hours for the Central Library.⁴³ The use statistics appear to indicate that patron access to the materials is not the only factor in their use—patrons need experienced genealogy reference assistance to fully understand and use these materials.

Beginning October 1, 2014, Texana/Genealogy staff started recording in-house use of cataloged materials. Though only three months of data is available, it does provide some useful information. The total number of Texana/Genealogy items used October through December 2014 was 4,249. Just 11 percent of these (468) were genealogy items.⁴⁴

Collection Development Policy

During 2012, a 22-page Collection Development Policy was drafted for Texana/Genealogy. It is quite detailed and is descriptive of the current practices. This policy has not been approved.⁴⁵ Donors of archives collections are normally directed to the most suitable institution for the type of collection offered. The San Antonio Regional Archivists organization fosters excellent cooperation between institutions that collect archival materials.⁴⁶ The Policy states that if a donor, “is insistent that the materials be deposited at the Library, every effort will be made to accommodate them.”⁴⁷

New Acquisitions

The *South Texas Researcher* newsletter, published monthly since January 2012, provides a great service to regular Texana/Genealogy researchers. Among the contents is a list of new acquisitions. Also, new acquisitions are shelved in a separate location for several weeks to permit patrons to easily peruse the additions before they are relocated to their ultimate places on the shelves.⁴⁸

Collections Recommendations

Consider Renaming Texana/Genealogy

Priority: April 2015; Estimated Direct Costs: low, though printing costs may apply

The name Texana/Genealogy does not clearly communicate the area’s focus to the average library patron. Many people do not know that “Texana” relates to the history and culture of Texas, and when “Texana” is combined with “Genealogy” the belief of many is that the area is for “Texas Genealogy.” Some have suggested “Special Collections,” as an alternative, which perhaps better encompasses the variety of resources in Texana/Genealogy, but the general public still is uncertain what that means. Other possible names include: Regional History and Genealogy; South Texas History and Genealogy; or, Texas History and Genealogy. An ad hoc group of staff and patrons may be useful in determining an appropriate

name for the library unit. The name should be decided before additional signage and similar recommendations in this report are implemented. The current public email address for Texana/Genealogy staff is genealogydesk@sanantonio.gov. This should be simplified as many people cannot spell "genealogy."⁴⁹

Microfilm Newspapers

Priority: October 2015; Estimated Direct Costs: \$5,000-\$10,000 annually

Numerous hardcopies of newspapers are collected on the Texana/Genealogy shelves, not only consuming scarce space, but deteriorating and growing into a larger problem to resolve. Microfilm, when done to preservation standards, is costly, but is still the best means and value for long-term preservation of newspapers. Backstage Library Works is a reputable preservation microfilm service bureau (<http://www.bslw.com/microfilm>)—other bureaus in the San Antonio area may be of equal quality and cost. Superior quality is vital and "microfilm meeting very high technical quality standards would allow for cost-effective scanning and yield high-quality digital images."⁵⁰ Ideally, funds should be budgeted to address the backlog, and then a maintenance-level budget should be planned annually.

Create EAD Finding Aids and Join Texas Archival Resources Online

Priority: June 2015; Estimated Direct Costs: \$350 plus training, or outsource for \$2,500-\$5,000

Texas Archival Resources Online (TARO) is a unified search portal that hosts finding aids from Texas archives and museum collections on University of Texas at Austin web servers. Finding aids on this publically accessible website are coded in the XML document type definition Encoded Archival Description version 2002 (EAD 2002) using the TARO style sheet. Once available in TARO, finding aids are searchable from the site and are indexed by the major Internet search engines. Finding aids have very limited use outside of the archives if they are not discoverable on the Internet. With XML software, EAD finding aids can be created from existing finding aids in plain text format by copying and pasting content in the appropriate fields. Outsourced conversion of the approximately 500 pages of legacy finding aids to EAD is an option for approximately \$5-\$10 per typed page. In-house EAD mark-up requires trained staff and XML authoring software (oXygen @~\$350, NoteTab @~\$40, or XMetal @~\$350).⁵¹ Depending on the selected software, initial purchase and annual licensing fees may apply. Participation in TARO requires approval by Software Developer Minnie Rangel (mrangel@austin.utexas.edu) and one Steering Committee Co-chair: currently either Amanda Focke (afocke@rice.edu) or Kelly Kerbow-Hudson (kkerbow@austin.utexas.edu). The emailed request should "Include a blurb about your repository so that we can determine how you fit with the collection."⁵² Subscriber fees for TARO members are under consideration.

Refine and Finalize the Collection Development Policy

Priority: August 2016; Estimated Direct Costs: \$0

The current draft of the Collection Development Policy is very detailed. A much shorter collection development statement will better communicate to patrons and prospective donors what Texana/Genealogy collects and what it does not collect. The purpose is to provide a clear document that can be used to explain why Texana/Genealogy may, or may not, be the best location for some materials. The Reference and User Services Association has excellent guidelines for preparing collection development policies on their website.⁵³

Reevaluate Acquisitions Budget Ratio

Priority: August 2015; Estimated Direct Costs: \$0

The \$20,000 annual acquisitions budget for Texana/Genealogy materials currently is roughly allocated 1/3 to Texana purchases and 2/3 to genealogy purchases. During the first quarter of the current fiscal year, use of genealogy books accounted for 11 percent of the total use. This may be an anomaly, so additional data is required; however, the reference statistics discussed in the next section mirror the more frequent use of Texana materials. If this proves to be a trend, it may be prudent to revise the budget allocation ratio and expend more funds on acquiring Texana materials. Purchasing rare and out-of-print items can quickly consume a modest budget, so additional funds could bolster regional history holdings. Niche purchasing for genealogy may better serve patrons, too. Focusing on difficult to find publications from genealogical societies can complement other genealogy library holdings in the region.

VISITORS AND PROGRAMS

In an increasingly complex and financially uncertain world, we must continually sell our service. Without promotion / marketing / outreach, we jeopardize our existence, our opportunity to do those uniquely archival activities that alone used to constitute “archival work.”⁵⁴

David B. Gracy II
Former Texas State Archivist

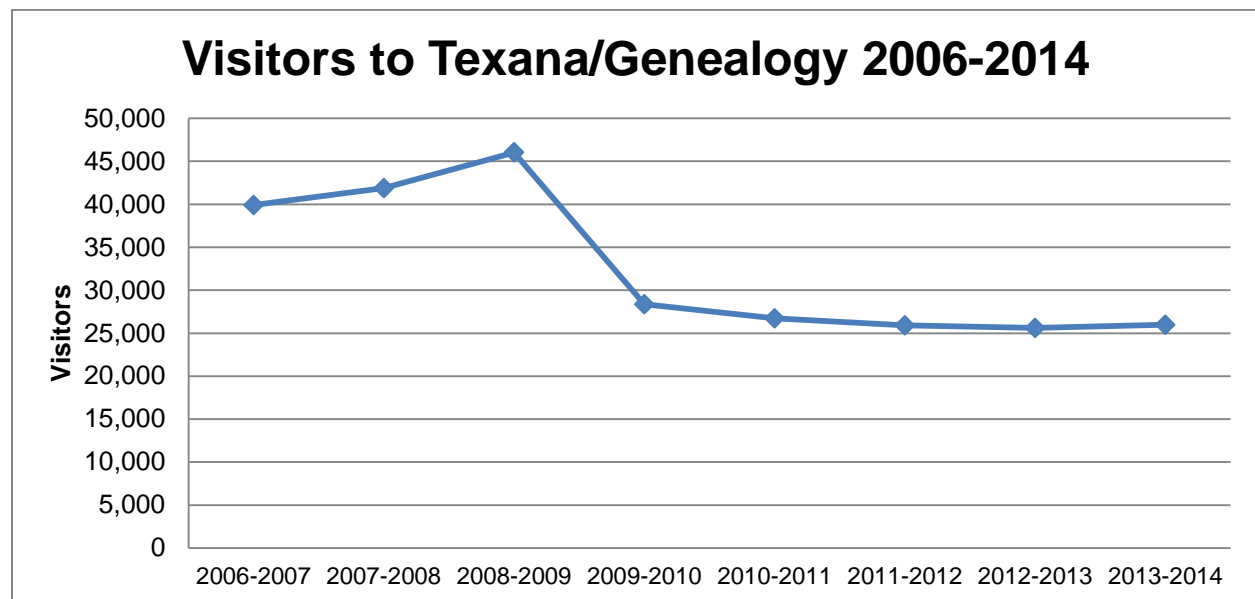
Patron Survey

Based on a patron survey conducted in 2000 and statistics collected on the use of microfilm and vault materials, between 75 and 80 percent of visitors to Texana/Genealogy are San Antonio, or nearby, residents. About 75 percent of those surveyed were working on family history research and 50 percent of them were novices. A similar survey in 1996 found that less than 25 percent of those doing genealogy research considered themselves beginners. More than 60 percent of those surveyed during 2000 were researching ancestry in states other than Texas.⁵⁵

Visitor Statistics

Statistics for patron visits to Texana/Genealogy are available from the 2009–2010 fiscal year to the present. The data show a decline of 38.4 percent between FY2008–2009 and FY2009–2010, a 5.8 percent decrease between FY2009–2010 and FY2010–2011, and a tapering decrease of 3 percent, and then 1.7 percent, during the following two fiscal years. FY2013–2014 saw a 1.5 percent increase in visits over FY2012–2013.⁵⁶ Library visits statistics for the SAPL system also declined by more than 4 percent between FY2008–2009 and FY2009–2010.⁵⁷

During October 2009, operating hours for Texana/Genealogy were reduced from 72 hours per week to 40 hours per week. Similarly, branch hours were reduced from 64 to 56 hours per week. During December 2009, the Central Library was closed for atrium skylights replacement and other work.⁵⁸ At the same time, the genealogy books and serials were moved out of the Texana/Genealogy area to the current location on the sixth floor.⁵⁹



*FY2006–2009 visitors statistics are estimated based on an average ratio of .935 items used per visitor calculated for the fiscal years 2009–2014.

During the first quarter of FY2014–2015 Texana/Genealogy counted 5,524 visitors and assisted with 9,683 total patron transactions, 72 percent of which were consultations that involved reference skills and knowledge of the resources. About 73 percent of the in-person requests for reference assistance were Texana related.⁶⁰

Classes and Programs

Attendance at Texana/Genealogy classes and programs has averaged about 2,070 annually over the past five years. The number of classes and programs average about 50 for the same period.⁶¹ Most of the Texana/Genealogy in-library and outside programming is instructional: Beginning Genealogy; Bible Records; Census Records; Courthouse Records; Hispanic Genealogy; Introduction to Military Records; Introduction to SAPL Databases; Oral Histories; and Preserving Family Treasures. Texana/Genealogy staff members also teach computer classes on: Ancestry Library Edition; FamilySearch; Find A Grave; Genealogy Software; House History; and WorldCat and Library Catalogs. One of the major outreach efforts is two days participation at the Texas Folklife Festival, where a Name Booth is staffed by Texana/Genealogy experts who assist festivalgoers with finding the ethnic origins and meanings of their surnames. Past programs include speakers on the Texas Underground Railroad, San Antonio Military History, and other regional history topics.⁶²

Publishing

Texana/Genealogy was responsible for editing and publishing the quarterly journal, *The Explorer*, until it was discontinued last year. The journal is held by a number of libraries throughout the U.S.⁶³

South Texas Researcher is a monthly newsletter for Texana/Genealogy that is emailed to patrons and is also available on the Texana/Genealogy homepage. The newsletter includes information about upcoming events and classes, new acquisitions, and partner organization announcements.⁶⁴

National History Day

Texana/Genealogy staff members have participated as judges for National History Day. Students working on history projects using Texana/Genealogy resources have diminished over the past few years.⁶⁵

Visitors and Programs Recommendations

Maintain Current Operating Hours

Priority: March 2015; Estimated Direct Costs: status quo

The 44 percent reduction in Texana/Genealogy hours at the beginning of the 2009–2010 fiscal year is a direct cause of the 42 percent decline in visitors during the following two years. Further reduction of the operating hours could result in another steep decline, as visitors become frustrated and stop using the resources because the area is not open when they can conduct research.

Increase Operating Hours

Priority: 2017–2018; Estimated Direct Costs: based on staff additions

Ideally, Texana/Genealogy hours will, in time, return to the same operating hours as the Central Library. This increase will need to be justified by an increase in visitors at current operating hours, which will indicate greater demand for the resources and reference assistance. The increased demand will be the result of implementing changes to marketing the collections and improved public awareness.

Improve Statistics Tracking

Priority: March 2015; Estimated Direct Costs: \$0

Tracking accurate statistics is important to evaluate the impacts of changes and the overall use of the Texana/Genealogy collections. Statistics should be recorded in a spreadsheet with checks and balances to ensure calculations are accurate. Reference transactions should be recorded separately for Texana and Genealogy questions, and identified as in-person, telephone, or correspondence. Non-reference transactions should be recorded for directional questions, computer/copier assistance, and microfilm assistance, and directional questions should be identified as in-person, telephone, or correspondence. There may be value in additional categories; however, it is easy to go overboard. Transactions should be recorded by all staff members with tick-marks on a statistics sheet at the reference desk. This should be

done on a new sheet each day. One staff member should enter daily statistics into the spreadsheet; however, the spreadsheet should be available for all staff to review. Beginning and end-of-day visitor counts should be entered on the daily statistics sheet. The statics spreadsheet should have a formula to divide the difference between the end-of-day and beginning-of-day counter numbers by 2 to get a total number of visitors.

At the beginning of FY2014–2015, Texana/Genealogy staff started to record the in-house use of items used prior to reshelving. The catalog will be able to accurately provide reports on the titles used and number of uses. This information is very valuable for evaluating what specific subjects are researched most frequently.

Apply to Become a FamilySearch Affiliate Library

Priority: September 2015; Estimated Direct Costs: \$0

FamilySearch Affiliate Libraries provide public access to billions of genealogical and historical records on 2.5 million rolls of microfilm delivered through the online Family History Library Catalog at FamilySearch.org (see [Appendix 3](#)).⁶⁶ This virtually expands an Affiliate Library's accessible holdings without the need to store or maintain the vast resources. The concept is simple. A patron opens an account with FamilySearch, orders and pays to borrow microfilm online, selects the Affiliate Library location, and receives an email when the film is available for use at the Affiliate Library. The Affiliate Library receives the microfilm shipped by FamilySearch, acknowledges the shipment via the Online Film Ordering Admin Panel, stores the loaned microfilm for the loan period, provides patron-use of the microfilm reader/printer equipment, and ships the microfilm back to the Family History Library in Salt Lake City at the end of the loan period.

Affiliate Libraries do not collect any money—fiscal transactions occur online between the patron and FamilySearch. Return postage is prepaid. There is not a cost to become an Affiliate Library, or to provide the loan service to patrons. The primary benefits for patrons are convenient use of Affiliate Library microfilm reader/printers during hours when LDS Family History Centers may not be open and local access to the Family History Library's microfilm collection of international records. The primary benefits to the Affiliate Library are the ability to significantly extend access to research resources and to serve more patrons who may have exhausted locally-held resources. The success of this service will depend on marketing efforts and on the Affiliate Library's hours of operation.

Increase Regional History Programming and Publishing

Priority June 2015; Estimated Direct Costs: \$5,000

With a few exceptions, most of the Texana/Genealogy public programming is focused on genealogy and genealogy resources. This programming should continue, however, additional programs on San Antonio's rich regional history would attract audiences that clearly have an interest in the Texana Collection and the historical research resources. A prime opportunity is the upcoming 300th anniversary of the founding of San Antonio in 2018. SAPL can take a leadership role in the commemoration by hosting a day-long history symposium in the Central Library Auditorium. Using the Pikes Peak Library District's award winning Pikes Peak Regional History Symposium as an example, the following proven plan could serve as a plan for SAPL as well. Humanities Texas may be a source for grant funding.⁶⁷

Each year a historical topic is selected for the coming year and a national Call for Proposals solicits presentations for the symposium event and for papers for potential publication. Proposals are evaluated and speakers are invited to present at the event, which is also broadcast live on PPLD.TV cable channel 17 and via PPLD's online Ustream channel, which has attracted viewers from all over the country. In addition to presentations, symposia usually include an entertainment element: Chautauqua; music; or films; and end with a reception. Our target audience is the general public. We have chosen topics that encourage new scholarship and have, at times, controversial perspectives. We emphasize quality research and encourage the use of primary sources. Here is a list of the symposia from past years:

- 2014 Bigwigs and Benefactors of the Pikes Peak Region
- 2013 Massacres of the Mountain West
- 2012 Disasters of the Pikes Peak Region
- 2011 Film and Photography on the Front Range
- 2010 Enterprise and Innovation in the Pikes Peak Region
- 2009 Rush to the Rockies! The 1859 Pikes Peak or Bust Gold Rush
- 2008 Doctors, Disease, and Dying in the Pikes Peak Region
- 2007 Extraordinary Women of the Rocky Mountain West
- 2006 “To Spare No Pains”: Zebulon Montgomery Pikes and his 1806–07 Expedition
- 2005 William Jackson Palmer, 1836–1909: Legends, Labors, and Loves
- 2004 Cripple Creek Labor Wars (1903–1904)

The goal of PPLD’s Pikes Peak Regional History Symposium is to provide innovative public programming with various facets that reach a larger audience than an annual history symposium event alone. The events consistently reach seating capacity (210), and are broadcast live on television and the Internet to extend our reach to home viewers. Edited DVDs and streaming video of the presentations are available later for library check-out and viewing online. Our edited Regional History Series books are products of the symposia (now 13 titles in print and numerous eBook formats) that contain chapters from selected symposium presentations, reprinted primary documents that add to the topic, numerous illustrations, and occasionally topic interpretations including plays and poetry.

At times, PPLD publishes reprints of books as primers for symposium topics. All of the books are available for sale and library check-out, as well as online from Amazon, Apple, Baker & Taylor Blio, Barnes and Noble, Diesel, Flipkart, Google Books, Kobo, OverDrive, Oyster, Page Foundry, Scribd, Smashwords, and Sony websites. The books themselves are stand-alone publications that are now used as textbooks for Colorado history classes at the Pikes Peak Community College. Some of the titles are used as reference books in our Children’s Department. Staff members edit, design, illustrate, and index the books with the assistance of volunteer historians.

PPLD’s Pikes Peak Regional History Symposium emphasizes quality humanities content and scholarship, provided in short, engaging, and entertaining presentations and book chapters that appeal to the varied demographics of our community. PPLD’s mission is to provide resources and opportunities that change individual lives and build community and to enable our community members to seek, engage, and transform. Evaluations for symposium events tie directly to the library’s mission and help us to assess our success by asking attendees to rate or answer questions like:

- Did the symposium engage my interest in community/regional history?
- Did the symposium increase my knowledge of community/regional history?
- Were your assumptions of the region’s history transformed based on what you heard at the symposium today?
- Will what you heard inspire you to seek more knowledge about the topic?

During the past decade, the Pikes Peak Regional History Symposium has reached thousands of individuals and has energized strong community interest in this region’s history through its events, broadcasts, streaming, and publishing. This effort has successfully built and engaged the community by presenting topics that elicit discussion and debate, and has encouraged people to learn more about their region’s history by interesting them in reading and in seeking out more information about their community’s heritage. Further details can be provided should SAPL wish to pursue a similar community history program. Planning for a 2018 event should involve partner organizations and should begin immediately to ensure a well-organized and successful program. Additional ideas are discussed in the book, *Archives Alive: Expanding Engagement with Public Library Archives and Special Collections*, by Diantha Dow Schull, published by ALA Editions (forthcoming Summer 2015).

INTERNET PRESENCE

Website

The San Antonio Public Library homepage includes a site search; navigation tabs; “Ask Us” FAQ search with an alternate topic dropdown menu; a promotional corner with featured services, Ask a Librarian link, Pay Library Fines link, and a small rotating marquee promoting selected resources and services; a snippet and link to the SAPL WordPress blog; a snippet and link to the Texana WordPress Today in San Antonio History blog;⁶⁸ a link to the SAPL Customer Satisfaction Survey; Closures; Upcoming Events; a larger promotional marquee; e-newsletter sign-up; links to SAPL social media channels; and a link to a Contact the office of the Library Director form. The footer includes links to: FAQs; Sitemap; Contact Us; About the Library; Library Board; and Wireless Printing.⁶⁹

SAPL Home : Services : Texana/Genealogy

Links to the Texana/Genealogy homepage and to the events calendar are located in a list under “Services.” The Texana/Genealogy homepage provides links to: Texana’s Blog; “African American Funeral Programs of San Antonio,” part of Texas Cultures Online hosted by the University of North Texas on *The Portal to Texas History* site; featured Texana/Genealogy Resource Guides (described below); Hours; Events; *South Texas Researcher* PDFs; and Photos.⁷⁰

The 3,097 “African American Funeral Programs” range in date from 1935–2011.⁷¹ Since August 2011, visitors to the *Portal* have viewed items in this Texana/Genealogy online collection more than 132,000 times.⁷² The programs are included in the Texas Cultures Online collections which “features local history materials from seventeen institutions depicting the diverse cultures of Texas during the nineteenth and twentieth centuries. . . . Funding for this collection was provided by the Amon Carter Foundation.”⁷³ The entire Texas Cultures Online collection includes more than 19,800 items that have been used more than 523,300 times since April 2011.⁷⁴ Texana/Genealogy’s “African American Funeral Programs” comprises 15.6 percent of the Texas Cultures Online collection and has realized more than 25 percent of the total collection’s use. All pages of each funeral program are imaged and include descriptive metadata. The site is easy to navigate and is a superior resource for primary source historical documents for students.

Texana’s Events lists upcoming programs and classes connected with Texana/Genealogy. The list links to detailed descriptions about events including the date, time, location, target audience, and contact information. If reservations are required, patrons must call or email Texana/Genealogy to secure seats. Trumba website calendar software is used for all SAPL programs and classes.⁷⁵

South Texas Researcher is the Texana/Genealogy newsletter and is published monthly “to keep librarians, historians, archivists, genealogists, archaeologists, and those in other allied fields informed of what is going on that may be helpful in these fields so they may pass this information on to other interested parties in their locations.”⁷⁶ The *South Texas Researcher* includes: news about Texana/Genealogy, news about South Texas resources and events; Texana/Genealogy classes and events; announcements about the San Antonio Genealogical and Historical Society; Los Bexareños Genealogical and Historical Society; area museums and other community partners; websites; and new acquisitions. The Texana/Genealogy homepage has links to Adobe PDF files for each newsletter since January 2012.

The link to Texana’s Photos is a widget link to the Texana/Genealogy Flickr album with 523 photographs of department exhibits and events that has been viewed about 550 times.⁷⁷

SAPL Home : Resources

The “Resources” tab from the library’s homepage links to SAPL’s Resource Guides, which includes a list of subjects linked to bibliographies.⁷⁸ Listed Texana/Genealogy general subjects include: Genealogy; History; Texana; and Texas. Each subject links to a Guide about a specific topic within the general subject. The Texana/Genealogy Guides include: Cemeteries; Civil War; Civil War in Texas; Death; Family History; Hispanic Genealogical Research; King James Bible; La Meri; Local History; Texas History; The

Wild West; Special Collections; and World War I. Each Guide includes links to Books, Books on CD, Downloadable Books, and Web Sites of Interest. Sidebars provide relevant information about the topic, timelines, and contact information for the staff member who created the Guide. In addition, Adobe PDF and Microsoft Word files containing information within Texana/Genealogy are linked and downloadable. For example:

- Archival Collections finding aids
- City Cemetery indexes
- Oral History indexes
- Publications produced by Texana/Genealogy (list)
- Research Collections in Texana/Genealogy (list)
- Resources for Local History (list)
- WWI articles from the *San Antonio Light* newspaper

Guides appear under multiple applicable subjects.

Though the brief descriptive text describing the Guides is discoverable by Bing, Google, and Yahoo search engines, the rich content of the Texana/Genealogy PDF and Word files is not search-engine-indexed and is not revealed by a search.

SAPL Online Public Access Catalog

SAPL has used the Innovative Interfaces Inc. (III) Millennium integrated library system since 2004 to manage its 1.8 million-volume collection and 5.3 million in circulation annually.^{[79](#)}

The Online Public Access Catalog (OPAC) is the primary access point for patrons to discover what is in the library's collection and where it is located in the SAPL system of 26 libraries. A Basic Search of the catalog searches for matching words in the title, author, subject, and notes fields of a record and allows patrons to search the entire collection, limit to Spanish, Juvenile, Young Adult, or Adult materials, or to limit results to what is available at a specific library location. A Basic Search can also be limited by format. An Advanced Search permits further limiting results by language, publisher, and/or publication date. Additionally, searches can be limited to the author, title, subject, and Dewey call number.^{[80](#)}

Though a patron can limit a search to the Central Library, it is not possible to limit catalog searches to materials located in the Texana or Genealogy collections. Because the Texana and Genealogy collections are reference collections that do not circulate, a catalog search resulting in an item for which the only library-held copy is located in the Texana or Genealogy collections will state under the title in the Search Results, "No copies are available for check-out at this time."^{[81](#)} While this is literally correct, the average library patron may interpret this to mean there is not a copy available for *use*. The misleading statement also appears when additional copies of an item exist in the catalog, but none are available on the circulating shelves for check-out, and yet there is still a copy available for use in Texana/Genealogy.

Internet Presence Recommendations

Link the San Antonio History Blog to the Texana/Genealogy Homepage

Priority: April 2015; Estimated Direct Costs: \$0

The Today in San Antonio History blog, featured on the SAPL homepage, is a great opportunity to entice potential patrons to Texana/Genealogy. Currently, the link from the blog snippet points to the WordPress site, which does not have a link to the Texana/Genealogy homepage. Linking the blog snippet from the SAPL homepage to an embedded expansion of the blog entry located on the Texana/Genealogy homepage will directly connect those curious about San Antonio history to the library's best source for related information.

Add Texana/Genealogy to SAPL Homepage

Priority: April 2015; Estimated Direct Costs: \$0

Patrons unfamiliar with SAPL may not find Texana/Genealogy's sole link to its department homepage under "Services." If an uninformed patron is attempting to learn if a library has a local history or genealogy department from the library's homepage, the window of opportunity to deliver the information is extremely short. According to Nielsen Norman Group, "the first 10 seconds of the page visit are critical for users' decision to stay or leave."⁸² Links to major library resources directly located on the SAPL homepage can improve the site's navigation. Including two links on SAPL homepage titled "Regional History" and "Genealogy," both pointing to the Texana/Genealogy homepage, will better ensure patron success in finding them.

The SAPL website would also benefit from a usability study, which can be conducted by SAPL staff, and integrating Responsive Web Design (RWD) to transform webpages into formats that are easy to read and navigate on tablets and smartphones. PPLD's main website is hosted by Pantheon, which is highly recommended by IT Officer Carolyn Coulter.⁸³

Redesign the Texana/Genealogy Homepage

Priority: May 2015; Estimated Direct Costs: possibly several hundred dollars if outsourced

A redesign of the homepage will improve site navigation and better inform patrons about available research resources. Add a paragraph description about Texana/Genealogy. Include navigation tabs that point to major components of the website: Texana/Genealogy home; genealogy and history subscription databases; archives description and finding aids; a landing page for digital collections like the "African American Funeral Programs"; programs, classes, and events; and contact information. A website with multiple access points to information within the site is easier to navigate.

Create a Texana/Genealogy Website

Priority: February 2016; Estimated Direct Costs: \$100 annually for domain and hosting

In addition to the Texana/Genealogy homepage, a separate website with its own domain, or subdomains of mysapl.org, can increase the discoverability of Texana/Genealogy and increase traffic to the site. The site should be maintained by Texana/Genealogy staff, within agreed-upon guidelines, and be linked to the Texana/Genealogy homepage on mysapl.org. Blog-style pages permit flexibility in page design that also allows use of Rich Site Summary (RSS) syndication. RSS can simplify content population of other webpages and some forms of communication. For an example of how RSS feeds can automatically populate a "What's New in Texana/Genealogy" page using Netvibes, see <http://www.netvibes.com/scppld>. This page includes information from blogs, new regional history and genealogy books in the catalog, and social media feeds.⁸⁴ Facebook and Twitter accounts also are excellent for promoting events and new acquisitions.

Enable Online Event Registration

Priority: March 2015; Estimated Direct Costs: \$0

The Trumba website calendar software used by SAPL for programs and events includes online event registration; however, this feature does not appear to be enabled for all Texana/Genealogy classes and events. Online registration is very efficient and enabling this functionality could "close the sale" with little additional patron effort. The Trumba website claims that there are "No transaction fees charged for free events."⁸⁵ Online registration is especially helpful for events with larger attendance capacities. An option for telephone registration is still necessary for some patrons.

Exploit Hidden Content in the Resource Guides

Priority: February 2016; Estimated Direct Costs: \$0-\$800

The Resource Guides are an excellent presentation of Texana/Genealogy resources and most are listed on the Texana/Genealogy homepage. The rich research information in the PDF and Word files is significantly diminished because the content of files cannot be found via Internet search engines. The cemetery indexes include thousands of burials in eight spreadsheets sorted alphabetically by surname.⁸⁶ Data in spreadsheet form is ideal for importing into a searchable database, which would be easier for patrons to use. This data also exist offline in a more extensive Microsoft Access database, which can be imported into a database and made accessible from the SAPL website.⁸⁷

Online indexes to local research resources extend the library's reach within the local service area and far beyond. Indexing permits easy patron access to information that is otherwise difficult, or impossible, to locate. Indexing is labor and time intensive; however, it can be accomplished by trained staff when on the reference desk and not serving patrons, and/or by trained volunteers, depending on the complexity and judgment required. An index is only a means to an end—the indexed content is the real object of interest. Ideally, an online index provides a means for a patron to order scanned copies of the content, as well as a link to the content after it has been scanned so that future patrons can access it. Online indexes are searchable databases that require a query form and a results page. The database resides on a web server, which can be locally maintained or hosted by a service provider. Caspio.com provides a low-cost cloud-based Microsoft SQL Server with a database construction wizard and extensive help and video instruction. SAPL staff with some technical knowledge could create an index database with web-based index entry, simple and advanced search forms, and email order fulfillment from a results or details page. A free version of Caspio Bridge is adequate to begin a project and to learn the functions at <https://free.caspio.com/>.⁸⁸ Additional capacity is affordable at approximately \$800 annually for a nonprofit organization.⁸⁹

Feature Photograph Collections Content

Priority: January 2016; Estimated Direct Costs: see Digitally Present Collections Online, below

The Texana's Photos widget link points to department photographs, however it does not point to images in the photograph collections. There is no indication on the Texana/Genealogy homepage that there are approximately 700 historical photographs in the collection.⁹⁰ The Local History Guide includes a slideshow link to one of six Picasa Web Albums containing 192 images with minimal metadata.⁹¹ Historical photographs appeal to all ages and can bring tremendous positive attention to a library and a searchable database of images, with Dublin Core metadata, can be used by anyone: elementary school students; teens; and university scholars, to extend the collection's reach when indexed by Internet search engines.

Digitally Present Collections Online

Priority: March 2016; Estimated Direct Costs: \$1,000-\$10,000 (annually)

"User demand for digitized collections remains insatiable," according to *Taking Our Pulse: The OCLC Research Survey of Special Collections and Archives*.⁹² Making collections of research resources available on the Internet is essential for marketing special collections in both academic and public libraries. Large and small special collections rely on the Internet to bring researchers to their virtual and physical sites. Without an easily-discoverable online sampling of a library's content, it is overlooked by potential patrons who would benefit from the library's resources. CONTENTdm Digital Collection Management Software is an OCLC product that stores and delivers digitized text, images, audio, and video via the Internet.⁹³ CONTENTdm can integrate with OCLC's WorldCat global library catalog, as well as OCLC's Digital Archive preservation service. The cost of CONTENTdm is primarily based on the number of digital items managed and on hosting fees. CONTENTdm can be self-hosted or hosted by OCLC. The initial license cost can be several thousand dollars, with an additional annual maintenance charge typically in the thousands of dollars. Extensive live online training is provided to new subscribers; however, knowledge of Dublin Core metadata basics is helpful. CONTENTdm is a good solution for many libraries, but may be best for libraries with significant digitized holdings.

Another digital repository option is DSpace, “an open source software platform developed and supported by our user community, with the help and guidance of DuraSpace.”⁹⁴ DSpace is used by Texas Tech University, Texas Woman’s University, University of Texas at Arlington, University of Texas at Austin, University of Texas at Dallas, and the West Texas Digital Archives.⁹⁵ DSpace software is free to install on a local server, can manage PDF, Word, JPEG, MPEG, and TIFF files, and is compatible with the Dublin Core metadata format. Annual membership is encouraged at levels starting at \$2,500 annually. DSpaceDirect is a hosted version of DSpace available by subscription with costs based on storage space. DSpaceDirect subscription packages include storage for up to 75GB for \$3,750 annually, up to 150GB for \$5,500 annually, and up to 250GB for \$8,250 annually.⁹⁶ A comprehensive comparison of 11 repository software options is available on the Repositories Support Project website: <http://www.rsp.ac.uk/start/software-survey/results-2010>.⁹⁷ Some of the repository software in the RSP report, evaluated during November 2010, is no longer supported.

A more modest option to consider for web-publishing collections is Omeka, which allows users to “Share collections, display documents and oral histories, or create digital archives with user-generated content.”⁹⁸ Though not as robust as CONTENTdm or DSpace, Omeka offers a lot to a library just beginning to put collections online. The software is simple to learn, uses Dublin Core metadata, and integrates with Google Analytics. The open source Omeka software is free, but must be installed and maintained on a local server. A hosted version is also available at Omeka.net with costs based on storage space. A free 500MB account is available with additional options ranging from 1GB for \$49 per year to 25GB for \$999 per year.⁹⁹ Several training videos for Omeka are available on YouTube.¹⁰⁰ Omeka is a project of the Roy Rosenzweig Center for History and New Media, George Mason University and Omeka.net is a project of the Corporation for Digital Scholarship in cooperation with the Center for History and New Media.

Implement Catalog Limits for Texana and Genealogy Collections

Priority: April 2015; Estimated Direct Costs: \$0

Implementing a method to limit catalog searches to the Texana and Genealogy collections will greatly improve the quality of search results for patrons and staff seeking items located in Texana/Genealogy.

Revise Catalog’s Availability Statement for Texana/Genealogy Items

Priority: April 2015; Estimated Direct Costs: \$0

For items in the SAPL catalog located in the Texana and Genealogy collections, revise the statement, “No copies are available for check-out at this time,” to read, “Available for use in Texana/Genealogy at the Central Library.” Since patrons searching the catalog may not click on a title to get more detailed information than the initial Search Results list provides, they may not realize that the item they need is accessible. Also, many library patrons are just looking for answers to their questions and will go where they must to get the required information. They should be encouraged to go the Texana/Genealogy if the resources and staff can assist in their quest.

FACILITY, SIGNAGE, SECURITY, AND PRESERVATION

Physical Layout

Since 1995, the Texana/Genealogy collections have been maintained on the sixth floor of the Central Library in downtown San Antonio. The sixth floor is accessible by two elevators and by stairs. The Texana/Genealogy public space includes a reference desk with ample ready-reference shelves, two spacious reading rooms with nine custom-made tables and combined seating to accommodate 50 patrons, an open stack area for the public to browse the Texana books and periodicals, a volunteer desk, abundant microfilm cabinets, three Canon microfilm reader printers, nine microfilm readers, a ScanPro 2000 microfilm scanner and computer, microfiche reader, computers, obituary card files, photocopier, patron lockers, map cabinet, exhibit cabinets, and display cases.^{[101](#)}

The staff area includes cubicles for four staff, a manager's office, coffeepot/microwave corner, and climate controlled vault. There is not adequate space for the typical types of work in a regional history collection, for example processing archival materials and exhibit preparation are best accomplished with large work surfaces located in secure areas where projects can be left until completed.^{[102](#)}

The genealogy books and current periodicals are located on the sixth floor outside of the Texana/Genealogy area. The outside area also includes the microfilm and older issues of the general periodicals, Latino Collection, NOWcastSA offices, Community and Public Relations offices, a microfilm reader/printer, a Low-Vision reader, a few public computers, and a reference desk.^{[103](#)}

The vault contains the most intrinsically valuable and fragile collections that require a controlled environment including archives and rare books. The shelves are nearly full, limiting the addition of archives materials and Hertzberg books that are currently located near the Texana stacks.^{[104](#)}

Signage

Signage identifying Texana/Genealogy is minimal. A small sign at the elevators indicates the Texana/Genealogy area is located on the sixth floor. There is no signage inside the elevators identifying what is located on any of the floors, and once arriving on the sixth floor there is no signage in the immediate vicinity indicating the location of Texana/Genealogy on the sixth floor. After exiting the central elevators, and passing through a closed and unmarked door, there is a large sign painted on the wall for Texana/Genealogy and the Latino Collection with an arrow pointing around the corner. A large painted sign for the Latino Collection is at the end of the hall. About mid-way down the hall there are two doors to Texana/Genealogy. There is an 8½" x 11" sign on one door labeled "Texana/Genealogy Department" with the operating hours and a smaller sign to the right of the door that says "Texana/Genealogy." There is no signage outside of the south elevators indicating the location of Texana/Genealogy.^{[105](#)}

Signs inside of the Texana/Genealogy area are adequate and practical, but appear temporary. For example, laminated laser-printed 8½" x 11" sheets acknowledging the generous gift of two microfilm reader/printers are taped to the sides of the machines.^{[106](#)}

Collections Security

Radio Frequency Identification (RFID) tags, adhered inside Texana/Genealogy books, provide passive theft protection. The collections were not tagged retrospectively—only new acquisitions have RFID tags (a small percentage). Security gates at the first floor exit sound an alarm when books with activated tags pass through. Theft of Texana/Genealogy books would not pose a challenge as the tags are easily identified and removed to circumvent the gates.^{[107](#)}

With the exception of materials located in the vault, most of the Texana/Genealogy collections are in publically browsable stack areas with no direct staff supervision or security cameras. Staff members at the Texana/Genealogy reference desk provide the primary theft protection, however materials can be concealed in the bags, briefcases, or purses that are permitted in the reading rooms and stack areas.^{[108](#)}

Patron lockers are located in the stack area, well beyond the entrance to Texana/Genealogy, and are currently used by patrons who wish to secure their personal items while in the area. A volunteer desk is opposite the lockers, however it is infrequently occupied.^{[109](#)}

Archives

Archival resources are stored in the climate-controlled vault inside customary acid-free archives boxes and folders. Materials from the Archives are provided to researchers, often one folder at a time, for use in the staff-observed reading room. This high level of control is necessary to ensure that these irreplaceable resources are not damaged or lost. Patrons are permitted to make photocopies of archival materials unless the documents are fragile.^{[110](#)}

Collections Preservation

The patron photocopier is located in a secluded area adjoining the largest reading room and is not observable by staff at the reference desk. It is possible for unknowing patrons to damage fragile materials in an attempt to capture a good photocopy.

Most of the collections are on metal shelving and not subject to damage due to chemicals contained in untreated wood products. Some shelving in the vault, holding archives materials, are pressboard that can contain damaging formaldehyde—the shelves are covered with polyester sheets to provide a barrier between the potentially harmful wood and the boxes containing the archival materials.^{[111](#)}

Large pressboard book trucks are in use holding Hertzberg books pending relocation to the vault.

The vault is climate controlled (relative humidity and temperature) and has a wet-pipe fire suppression system. There are no environmental data loggers in the vault or other Texana/Genealogy stack areas for on-going monitoring of actual conditions.

The vault roof has a history of leaking during rains. The situation has improved, but is only partially mitigated. There are no alarms in the Texana/Genealogy area to alert staff to the presence of potentially damaging water.^{[112](#)}

Food and drink are located in the staff area. Insects attracted by food and sugary drinks may also consume paper sizing, adhesives, leather, and book pages.^{[113](#)}

Texana/Genealogy does not have a Disaster Recovery Plan.^{[114](#)}

Facility, Signage, Security, and Preservation Recommendations

Serve Texana/Genealogy Patrons in the Smaller Reading Room

Priority: December 2016; Estimated Direct Costs: \$0

Patrons using Texana books and archives materials should be seated in the small reading room where they can be assisted and easily observed by Texana/Genealogy staff.

Relocate the Photocopier to the Smaller Reading Room

Priority: July 2016; Estimated Direct Costs: \$0

The current location of the patron-use photocopier is not observable by staff. The photocopier should be relocated to the small reading room where use can be monitored and staff assistance provided. The copier could replace the case currently displaying artifacts relating to the USS San Antonio LPD-17—a power outlet is located on this wall.

Temporarily Close the Texana Book Stacks Area

Priority: December 2016; Estimated Direct Costs: \$0 (staff in offices may need to be on call to page materials)

Closing the entire room where the Texana books and microfilm currently are stored will enable better control of the Texana books until they are RFID tagged and a security gate is located inside the entrance to the Texana/Genealogy area. Though closing the stacks is a barrier to public browsing, it is a reasonable temporary solution to maintain higher security and accountability for the book collection. Patrons can request books via a call slip, which are then paged by staff, returned to staff after use, entered into the catalog as in-house use for accurate statistics, and then reshelfed by staff.

Relocate Selected Microfilm, Microfilm Readers and Printers, and Map Cabinet

Priority: December 2016; Estimated Direct Costs: \$0

If the Texana stack area is closed, some of the microfilm and microfilm readers and printers should be moved into the larger reading room. Four or five of the tables and chairs currently located in the larger reading room should be moved into the closed stack area for use by staff for archives processing and possible exhibit preparation (with adequate protection to prevent damage to the tables). The volunteer desk can be reassigned to staff. Some of the old microfilm readers can be retired, or stored. All of the 180 drawers of U.S. Federal Census microfilm can be left in the closed area and paged if needed.

Install Patron Lockers Outside of the Texana/Genealogy Reading Room

Priority: December 2016; Estimated Direct Costs: \$2,800

For added materials security, lockers should be provided outside of the Texana/Genealogy area for patrons to secure their backpacks, bags, briefcases, purses, etc. Lockers should have cylinder cam locks with unique keys for each locker. Keys must be checked-out to each patron with personal items.

Install Compact Shelving in the Vault

Priority: 2017–2018; Estimated Direct Costs: up to several thousands of dollars

There is no shelf capacity for additional materials in the vault, nor is there room to add more shelving. Compact shelving could come close to doubling capacity, however it is expensive. The floor load capacity should be determined by an engineer.

Evaluate Location Alternatives

Priority: June 2015; Estimated Direct Costs: \$0

The costs to retrofit compact shelving and other capital improvements for Texana/Genealogy may be prohibitive in the current sixth floor location. Alternative building locations may provide better-suited patron, staff, and stacks space. Pikes Peak Library District's Special Collections is located in a restored 1905 Carnegie Library that is attached to the downtown library building. The ambiance of the magnificent older building attracts visitors who never knew about Special Collections and the available resources.

RFID Tagging and Gates

Priority: 2017–2018; Estimated Direct Costs: Security Gate~\$20,000, RFID tags ~\$0.20 each

The only security gates in the Central Library are located at the first floor exit. Savvy thieves know to remove RFID tags, or disable them, to prevent security gate alarms from sounding. In a closely monitored Texana/Genealogy reading room it is less likely that the tags can be compromised and attempts to leave the area with tagged materials will more likely be thwarted if gates are installed in the Texana/Genealogy area. The gates only work if the materials are RFID tagged, so a retrospective tagging of the Texana books should be considered. Investigate the workflow required to simultaneously inventory the collection.

Improve Signage

Priority: July 2016; Estimated Direct Costs: \$500-\$2,000

Other than the nicely painted sign on the wall on the sixth floor, there is no signage directing patrons to Texana/Genealogy. Additional signage is recommended outside of the elevators on the sixth floor, inside the elevators indicating what is located on every floor, and in the hallway outside of the Texana/Genealogy area. The hallway signage can be an attractive free-standing double-sided pedestal display, or can hang from the ceiling.¹¹⁵ Patrons should be able to easily identify the Texana/Genealogy area from either end of the hallway. Avoid temporary-looking signage (laser-printed pages taped to equipment and walls). Use clear acrylic frames to hold laser-printed signs that are frequently updated. Renaming the area should be considered prior to investing in permanent signage.

Deploy Preservation Environment Monitors in Texana/Genealogy Storage Areas

Priority: July 2015; Estimated Direct Costs: \$3,700

Preservation Environment Monitors are data logging devices that work with the web-based eClimateNotebook[®] software developed by the Image Permanence Institute, Rochester Institute of Technology. The model PEM2 loggers record relative humidity and temperature and data are downloaded to a USB drive to upload to the eClimateNotebook website. The website provides tools to analyze the environment and recommends changes to improve materials preservation. The PEM2 devices cost approximately \$350 each (\$299 for 10 or more) and the eClimateNotebook website subscription is \$120 each year. Ideally, loggers should be located in the vault, staff area, both reading rooms, the stack area (x2), and each of the three large exhibit areas. The loggers can be moved and purchased over time as budget permits.¹¹⁶

Install Water Alarms

Priority: April 2015; Estimated Direct Costs: \$30

Water detectors should be deployed in vulnerable areas, like the vault, which has a history of leaking when it rains. Battery operated units are common and single use alarms with 2-year batteries are very economical.¹¹⁷

Install Security Cameras and Intrusion Detectors

Priority: 2017–2018; Estimated Direct Costs: up to several thousand dollars

Security cameras are advisable in browsable stacks, reading rooms, and staff areas. Recording ability is highly recommended. A security system with door contacts and motion sensors will help to secure the Texana/Genealogy area when not open to the public.

Upgrade the Fire Suppression System

Priority: 2017–2018; Estimated Direct Costs: up to several thousand dollars

The 20-year-old wet-pipe fire suppression system can extinguish a fire in the vault, but could also do irreparable water damage to the valuable materials. Current fire suppression technology utilizes chemical fire-suppressing agents, instead of water, that quickly consume the oxygen in a room to deprive flames of fuel.

Prohibit Food and Drink in Research, Storage, and Staff Areas

Priority: March 2015; Estimated Direct Costs: \$0

Food and drink should not be permitted in the Texana/Genealogy area. Stored foods, crumbs, and sugary-drink spills attract undesirable insects that can harm the collections. Texana/Genealogy staff should consume all food and drink in the SAPL staff lounge. A reasonable exception is to permit staff to consume water at their desks as long as it is in a sealed bottle that is kept on the floor.

Develop a Disaster Recovery Plan

Priority: March 2015; Estimated Direct Costs: \$465

Amigos Library Services provides resources and classes to assist with developing a disaster recovery plan. A plan template for libraries and archives is online at <http://www.amigos.org/node/73> and a Pocket Response Plan (PreP)[™] template is available on the Council of State Archivists website at <http://www.statearchivists.org/prepare/framework/prep.htm>.¹¹⁸ In case of a disaster, a plan will better ensure that the most important materials are rescued first and that damage is as limited as possible. Amigos conducts live-online classes including: “Emergency Preparedness: Response and Recovery” (\$165 for Amigos members); and “Know & Go: Disaster Planning Tech Tools and Apps” (no cost to Amigos members).¹¹⁹ Assembling and maintaining a Disaster Kit (or two) containing emergency response supplies is advisable. Kits can be purchased or assembled from scratch.

The ALA website has comprehensive information about disaster preparedness and recovery at <http://www.ala.org/advocacy/govinfo/disasterpreparedness>.¹²⁰

In addition, Texana/Genealogy staff should invite the local Fire Department to visit the library for a tour so that emergency responders can know the physical locations of the most critical collections. Provide them with a copy of the disaster plan, including floor plans that identify important locations.

STAFFING

Reference and Other Texana/Genealogy Work

Texana/Genealogy is currently open to the public 40 hours each week with a staff of five FTE—four professional staff and one paraprofessional. There is one Texana/Genealogy reference desk attended by a staff member during all operating hours, and a second reference desk on the sixth floor that is attended either by a Texana/Genealogy staff member, or a Reference Department staff member, during all Central Library operating hours. Staff members at the Texana/Genealogy reference desk provide patron assistance for the Texana collection, within the Texana/Genealogy area, as well as the genealogy and general periodicals collections located outside of the area. When the Texana/Genealogy area is closed, staff members at the reference desk outside of the Texana/Genealogy area provide reference assistance to patrons using the genealogy collection, though Reference staff may not have as much experience with some of the genealogy resources.^{[121](#)}

In addition to in-person, phone, and written reference assistance, Texana/Genealogy staff members perform the following work:

- Acquisitions/Collection Development
- Archives processing
- Cataloging
- Equipment cleaning and maintenance
- Exhibit preparation and installation
- Outreach at community events
- Participating in library and professional meetings
- Periodic reports
- Preparing and updating Library Guides and bibliographies
- Preparing and teaching classes
- Promotional communications
- Shelving and shelf reading
- Shifting
- Spine label corrections
- Tours
- And other tasks

Management and Texana/Genealogy Personnel

After 37 years of service to SAPL, Texana/Genealogy's manager, Frank Faulkner Jr., retired on September 30, 2014. Faulkner managed the department for 13 years.^{[122](#)} The manager position was eliminated and Texana/Genealogy was administratively moved into the Reference Department under the leadership of Dianna Morganti, Interim Central Library Coordinator.^{[123](#)}

The remaining five staff members in Texana/Genealogy have decades of combined experience in the unit. Each staff member is committed to excellent public service employing their specialized training, knowledge of the Texana/Genealogy collections, and experience with providing expert reference assistance to patrons who range in know-how from elementary school students to professional scholars. Two Texana/Genealogy staff members have earned the credential of Certified Archivist by the Academy of Certified Archivists, and a third staff member is working towards this recognition.^{[124](#)}

Temporary funding was allocated for FY2014–2015 allowing Texana/Genealogy to continue operating 40 hours per week. Similar to its holdings, the collective abilities of Texana/Genealogy staff are superior—if disbanded, it would require many years to rebuild a staff of comparable training, knowledge, and experience and would result in a costly intellectual loss to the Library and the community.

Staffing Recommendations

Stabilize Texana/Genealogy Funding

Priority: March 2015; Estimated Direct Costs: \$50,000 annually

As previously stated, further reduction in Texana/Genealogy hours would be ruinous. Efforts are immediately necessary to stabilize funding and ensure that Texana/Genealogy remains open to the public at least 40 hours per week during FY2015–2016, and beyond.

Evaluate the Need for the Second Reference Desk on the Sixth Floor

Priority: August 2015; Estimated Direct Costs: \$0

Texana/Genealogy staff members currently are needed to tend the second reference desk on the sixth floor. Reference transaction statistics for this desk may reveal that it is not utilized during some of the hours of operation. Should this be the case, a reallocation of hours to Texana/Genealogy would make sense.

Prepare to Hire a Texana/Genealogy Manager

Priority: October 2015; Estimated Direct Costs: \$93,000 annually (salary and benefits)

Additional public programming, publishing, and other content-creation activities will strain the current five FTE in Texana/Genealogy. Hiring a manager (no later than FY2016–2017) to assist with leading the staff will better ensure Texana/Genealogy's success and further stabilize the unit. This will require the Library's commitment to maintain Texana/Genealogy as a strategic priority. The manager position can provide an exciting challenge for someone with innovative ideas for engaging the public and experience in special collections management.

THREE YEAR PLAN

Below is a proposed timeline for the recommendations in this report. The plan first implements specific recommendations that are dependencies for subsequent recommendations. Some recommendations may be urgent or may potentially have more impact if started immediately; others are independent or less time-sensitive and the execution is less critical. For the purposes of this plan it is assumed that Texana/Genealogy remains open 40 hours per week at current staffing levels.

The Texana/Genealogy staff is very competent and capable of undertaking most of the goals below. Ideally, a manager would be hired to lead the Texana/Genealogy staff and contribute her/his experience and skills to achieve the goals. Some of the recommendations are simple things that require little time, some require the assistance or participation of others, and some require training and preparation.

March 2015 Goals

- Maintain Current Operating Hours; *Est. Costs: status quo*
- Stabilize Texana/Genealogy Funding; *Est. Costs: \$50,000 annually*
- Develop a Disaster Recovery Plan; *Est. Costs: \$465*
- Prohibit Food and Drink in Research, Storage, and Staff Areas; *Est. Costs: \$0*
- Improve Statistics Tracking; *Est. Costs: \$0*
- Enable Online Event Registration; *Est. Costs: \$0*

The highest priority is to complete a Pocket Response Plan (PreP)[™] disaster recovery plan. Select the Microsoft Word template that best suits the library from the Council of State Archivists website:

<http://www.statearchivists.org/prepare/framework/prep.htm>. Revise as needed. This plan is designed to contain all of the vital contact information needed in case of a disaster, and folds to easily fit in a wallet or purse. Attend Amigos training if available, but do not wait for training to complete the PreP.

Adopt a no food or drink policy in the Texana/Genealogy area (public and staff).

Determine what statistics are required or desired and create a daily statistics sheet and an Excel spreadsheet to maintain the data for monthly/annual reporting.

Enable online event registration on Trumba. This may require assistance from another SAPL department.

April 2015 Goals

- Consider Renaming Texana/Genealogy; *Est. Costs: \$0*
- Add Texana/Genealogy to SAPL Homepage; *Est. Costs: \$0*
- Implement Catalog Limits for Texana and Genealogy Collections; *Est. Costs: \$0*
- Revise Catalog's Availability Statement for Texana/Genealogy Items; *Est. Costs: \$0*
- Link the San Antonio History Blog to the Texana/Genealogy Homepage; *Est. Costs: \$0*
- Install Water Alarms; *Est. Costs: \$30*

Many recommendations depend on determining if the name for Texana/Genealogy will change. Form an ad hoc committee of Texana/Genealogy staff and Friends, SAPL staff, SAPL Foundation staff, and patrons to discuss alternative names for the area for recommendation to SAPL administration.

Once a name is approved, add links from the SAPL homepage to the Texana/Genealogy homepage. Links should be added even if temporary, pending a revamp of the entire website.

In the catalog, add the search limits and revise the message regarding the location and availability of Texana/Genealogy materials. These changes will require assistance from another SAPL department.

Embed the Today in San Antonio History blog on the Texana/Genealogy homepage and link to it from the blog snippet on the SAPL homepage. These changes will require assistance from another SAPL department.

May 2015 Goals

- Redesign the Texana/Genealogy Homepage; *Est. Costs: possible several hundred dollars if outsourced*

A reworking of all of the Texana/Genealogy pages may be planned if the SAPL website is undergoing a redesign. Texana/Genealogy staff should discuss the content and layout of the pages and involve selected patrons for assistance. A usability study is recommended.

June 2015 Goals

- Create EAD Finding Aids and join Texas Archival Resources Online; *Est. Costs: \$350-\$5,000*
- Increase Regional History Programming and Publishing; *Est. Costs: \$5,000*
- Evaluate Location Alternatives; *Est. Costs: \$0*

Contact Texas Archival Resources Online representatives about participating in the TARO database. Determine if software should be purchased or if outsourcing conversion of existing finding aids is more cost effective than converting in-house. All future finding aids will use Encoded Archival Description and will be uploaded to TARO.

Contact potential partners for a 2018 tercentennial commemoration symposium event at the Central Library. The planning committee will determine a date for the event and draft a call for proposals for speakers and writers for the forthcoming book.

Discussion with Texana/Genealogy staff and Friends, and SAPL Administration and Foundation should begin regarding the continued location of Texana/Genealogy at the Central Library versus an alternative location.

July 2015 Goals

- Deploy Preservation Environment Monitors in Texana/Genealogy Storage Areas; *Est. Costs: \$3,700*

Purchase PEM2 data loggers to monitor the relative humidity and temperature in the vault and other Texana/Genealogy locations. Evaluate the data and communicate with the SAPL facilities manager regarding issues and any needed changes.

August 2015 Goals

- Reevaluate Acquisitions Budget Ratio; *Est. Costs: \$0*
- Evaluate the Need for the Second Reference Desk on the Sixth Floor; *Est. Costs: \$0*

Evaluate the in-house use data for FY2014–2015 to determine if genealogy materials use has increased, or remains low. Determine if an adjustment in the ratio of collection development expenditures is required.

September 2015 Goals

- Apply to Become a FamilySearch Affiliate Library; *Est. Costs: \$0*

Contact The Church of Jesus Christ of Latter-day Saints to establish Texana/Genealogy as a FamilySearch Affiliate Library.

October 2015 Goals

- Microfilm Newspapers; *Est. Costs: \$5,000-\$10,000 annually*
- Prepare to Hire a Texana/Genealogy Manager; *Est. Costs: \$93,000 annually (salary and benefits)*

Ship hardcopies of newspapers for 35mm preservation microfilming—quantity will be based on the available budget.

Hiring a manager should be requested in the FY2016–2017 budget (earlier, if possible).

January 2016 Goals

- Feature Photograph Collections Content; *Est. Costs: \$0*

Deploy Omeka to make scanned photographs available on the Internet.

February 2016 Goals

- Create a Texana/Genealogy Website; *Est. Costs: \$100 annually for domain and hosting*
- Exploit Hidden Content in the Resource Guides; *Est. Costs: \$0-\$800*

A website in addition to the SAPL Texana/Genealogy pages can be created on Weebly, Wix, or similar host, to enable immediate promotion of Texana/Genealogy classes, events, and resources. This site should be linked to the Texana/Genealogy homepage on SAPL's website. Create a Caspio database for online access to the cemetery indexes. These may require assistance from another SAPL department.

March 2016 Goals

- Digitally Present Collections Online; *Est. Costs: \$1,000-10,000*

Add scanned city directories, documents, maps, and oral histories to the Omeka database. The most time-consuming aspect of this is the creation of the Dublin Core metadata. This is an ongoing effort.

July 2016 Goals

- Relocate the Photocopier to the Smaller Reading Room; *Est. Costs: \$0*
- Improve Signage; *Est. Costs: \$500-\$2,000*

Relocate the exhibit case in the small reading room and move the photocopier to this location. Design and install permanent signage.

August 2016 Goals

- Refine and Finalize the Collection Development Policy; *Est. Costs: \$0*

The refining of the Collection Development Policy will involve Texana/Genealogy staff, and perhaps representatives from the local genealogy societies.

December 2016 Goals

- Temporarily Close the Texana Book Stacks Area; *Est. Costs: \$0*
- Serve Texana/Genealogy Patrons in the Smaller Reading Room; *Est. Costs: \$0*
- Relocate Selected Microfilm, Microfilm Readers and Printers, and Map Cabinet; *Est. Costs: \$0*
- Install Patron Lockers Outside of the Texana/Genealogy Reading Room; *Est. Costs: \$2,800*

For added security, moving patrons into the smaller reading room and paging books from the Texana collection will enable better control over the collection. This can be temporary if RFID tags and gates are added. Freestanding lockers located outside of the Texana/Genealogy area also provide better security.

2017–2018, and Beyond Goals

- RFID Tagging and Gates; *Est. Costs: Security Gate~\$20,000, RFID tags \$0.20 each*
- Install Compact Shelving in the Vault; *Est. Costs: up to several thousands of dollars*
- Install Security Cameras and Intrusion Detectors; *Est. Costs: up to several thousand dollars*
- Upgrade the Fire Suppression System; *Est. Costs: up to several thousand dollars*
- Increase Operating Hours; *Est. Costs: based on staff additions*

All of these recommendations require significant funding and can be implemented at any time determined feasible.

PUBLIC LIBRARIES AND SPECIAL COLLECTIONS: PROFESSION AND BUDGET LANDSCAPE

Statistics

Counting how many books are circulated in an increasingly sophisticated society is not as impressive as it once was. . . . People want to know how many of those books were read and actually changed lives.¹²⁵

*Patrick Losinski,
CEO Columbus Metropolitan Library*

As Patrick Losinski describes, public libraries must extend the metrics used to evaluate effectiveness to encompass impact, which is valued more by the communities a library serves than are the tallies of visitors and reference transactions. Impact is much more challenging to measure—one must go to, and listen to, the community.

Surveys are the most common method to assess impact. The Library Research Service has excellent advice and survey templates on their website (<http://www.lrs.org/library-user-surveys-on-the-web>); however, these lack questions that relate to special collections in the library.¹²⁶ Appropriate questions should be added. Also, open-ended comment forms provide patrons an opportunity to quickly provide feedback and praise. Comments should be aggregated and used where appropriate.

Patrons who publish based on the content of SAPL collections should be encouraged to notify the library when their book, video, etc., is released. See [Appendix 1](#) as an example of products based on the resources in Texana/Genealogy.

Local Digital Content and Community

The traditional view is that library collections consist of information that empowers the creation of new knowledge. Looking to library users and their evolving information needs will help inform how best to accomplish that goal. . . . If public libraries fail to create and implement digital strategies, communities will become more deeply divided—between those who have the opportunity to participate in culture, civics, the workforce and nearly every other aspect of American life, and those who do not.¹²⁷

*America's Digital Future:
Advancing a Shared Strategy for Digital Public Libraries*

A nationally top ranked public library, the Columbus Metropolitan Library (CML) sets an excellent example for incorporating local history and genealogy collections into their public service model. The library recently acquired the entire Ohio State Library's genealogy collection and has launched community-based digitization projects to develop the local history holdings and make them accessible as Local Digital Holdings using OCLC's CONTENTdm.¹²⁸

CML's Local Digital Collections include: Columbus African American Collection; Columbus Memory; City Directory Collection; Columbus and Ohio Map Collection; Columbus Gay Men's Chorus Collection; Columbus in Historic Photographs; Columbus Yearbook Collection; Genealogy Collection; Ohio Postcard Collection; Ohio Transportation Collection; Finding Aid Collection; Columbus Rotary Collection, and more. Each collection includes images of primary sources with descriptive metadata that are both searchable and browseable.¹²⁹

Denver Public Library (DPL) has been a leader in digital collections since the 1990s. Their grant-funded Creating Your Community collected more than 1,000 photographs and 800 stories “to create a new way for citizen archivists to engage with their history.” Though the dedicated website has been retired for this community-based collection development effort, the public contributions continue to be available on DPL’s Western History and Genealogy Digital Collections site using CONTENTdm.¹³⁰ Public contributors to community digitization projects receive the added benefit of getting their historical resources digitized for their own uses. As reported in a 2013 Pew Research Center survey, “43 percent of Americans think that libraries should ‘definitely’ help patrons digitize material such as family photos or historical documents.”¹³¹

Community digitization projects must be much more than outreach efforts. According to Rich Harwood, founder and president of the Harwood Institute for Public Innovation, “Outreach activities tend to be around something the organization has created that it wants to promote. A lot of times these things don’t necessarily reflect the aspirations and concerns of the community itself. Libraries need to be aligned with the things that actually matter to people in their community if they want to be relevant and have impact.”¹³²

As illustrated above, both CML and DPL have thriving and productive local history and genealogy collections and both focus resources on developing local community collections in digital form delivered via the Internet. These efforts enhance the depth of their local history holdings through gifts of materials in digital and physical formats, but they also deliver the collected history to the schools and homes where people are seeking a more intimate connection to their public library and community history via their computers and Internet capable devices. Both CML and DPL continue to collect, preserve, and provide access to research resources to patrons in the traditional ways—in-person at the library—however, they are more effective in meeting the needs of their communities by not limiting access to their physical location during certain hours each day.

A 2011–2012 Information Policy and Assessment Survey (IPAS) of public libraries found that more than 40 percent of respondents rated “most important” that libraries provide “information about the library’s community.” The same survey revealed that only 25 percent of Texas public libraries made digitized special collections available remotely, while 53 percent of all public libraries surveyed nationally made digitized special collections available remotely (and almost 76 percent of all urban libraries).¹³³

Indexing has long been a practice for libraries to aid research in community newspapers on other local resources. At one time, index entries were typed and filed on cards and made available in cabinets accessible only within the library. This data is quite suited for online databases and extends access to anyone with Internet service. Pikes Peak NewsFinder is a good example of extending an online index of community resources to the next level by providing on-demand delivery of articles.¹³⁴

Local Digital Content and Education

We had a group, a gifted English class, from high school, and we pulled out copies of original maps and papers that were linked to San Antonio history and they couldn’t believe this stuff existed. We’ve had several of them call or email looking for primary materials, encouraged by their teachers.¹³⁵

*Frank Faulkner, Jr.,
Texana/Genealogy Librarian*

Many states, including Texas, have educational requirements that students in specific grades must learn about the history of their state. According to *Texas Essential Knowledge and Skills for Social Studies*, “In Grade 4, students examine the history of Texas from the early beginnings to the present within the context of influences of North America. Historical content focuses on Texas history, including the Texas Revolution, establishment of the Republic of Texas, and subsequent annexation to the United States;” and “In Grade 7, students study the history of Texas from early times to the present. Content is presented with more depth and breadth than in Grade 4. Students examine the full scope of Texas history, including Natural Texas and its People; Age of Contact; Spanish Colonial; Mexican National; Revolution and Republic; Early Statehood; Texas in the Civil War and Reconstruction; Cotton, Cattle, and Railroads; Age

of Oil; Texas in the Great Depression and World War II; Civil Rights and Conservatism; and Contemporary Texas eras. The focus in each era is on key individuals, events, and issues and their impact. . . . To support the teaching of the essential knowledge and skills, the use of a variety of rich primary and secondary source material such as documents, biographies, novels, speeches, letters, poetry, songs, and artworks is encouraged.”¹³⁶

Ivy Library, consultants for the SAPL strategic plan, recommended a “fast track” strategy to, “Align the Library’s programs and services with *Texas Essential Knowledge and Skills* (TEKS) by working with school districts and by providing training to librarians, teen liaisons, and other staff members.”¹³⁷

Where teachers once scheduled library tours to acquaint their students with the wealth of resources available in Texana/Genealogy, these visits have diminished and many teachers may not even know what is available at the library to inspire and engage their students.¹³⁸ Although putting more content online is key to marketing the possibilities of Texana/Genealogy resources to educators, involving the education community is an important component in the digital curation process to ensure the unique content serves the research needs of the students. A cooperative endeavor will better ensure that teachers also know about the undigitized Texana/Genealogy collections.

According to the 2013 Pew Research Center’s *Younger Americans’ Library Habits and Expectations* report, 87 percent of all Americans ages 16–29 believe libraries should coordinate more with local schools. Additionally, 80 percent of Americans under age 30 say it is “very important” for libraries to have librarians to help people find information they need.¹³⁹

Professional Training

In addition to traditional library and preservation training, special collections librarians require technical training in digital curation, research methodology, and publishing.

The Society of American Archivists has developed a certification program for Digital Archives Specialist. This training provides archivists “with the information and tools you need to manage the demands of born-digital records.”¹⁴⁰ As special collections digitize their collections and accession electronic records, they have the same responsibility to maintain these items as they do traditionally paper materials. Digital curation is “managing data to ensure they are fit for contemporary use and available for discovery and reuse.”¹⁴¹

Whether a public library is creating content, or assisting patrons in creating content, special collections staff members require skills in research and publishing. Libraries have published books based on their collections, republished important books no longer available in print, and assisted the public in publishing their own books. The latter is increasingly in demand and has potential to reinvigorate the public’s vision and use of public libraries. Describing her library’s venture into the publisher role, Director Dolores Greenwald of the Williamson County (TN) Public Library stated, “When the web became popular, libraries moved to assisting customers in learning, navigating, and evaluating sites. I consider this evolution in publishing to be similar, another adaptation to technological change.”¹⁴²

Budget

According to survey results published during 2013 in *Libraries: At the Epicenter of the Digital Disruption*, “Library budgets are bouncing back or holding steady in the wake of several years of a lackluster economy. But budget growth overall has been lukewarm. Public community libraries experienced the largest share of budget increases;” however, “Overall a total of 72% of respondents reported they had to tighten their belts in one area or another over the past year.” The areas experience the most cutbacks were personnel and book acquisitions, followed by serials acquisitions, and IT equipment and software.¹⁴³

SAPL’s budget is faced with reductions in the annual payment by Bexar County that currently only partially offsets the costs for the city library system to provide services to county residents. Bexar County contributed \$3.78 million to the SAPL budget for FY2014–2015, and County Manager Seth Mitchell has indicated that the county plans to reduce its annual contributions by a total of \$1.2 million over the next four years.¹⁴⁴ Library services provided to Bexar County residents amount to approximately 19 percent of

SAPL's annual budget—the current county contribution of \$3.78 million falls short by more than \$2.5 million in covering the costs to serve county residents.¹⁴⁵ “Some council members have indicated that the city isn't above cutting access to the county's estimated 400,000 non-city users of the library in a ‘worst-case scenario.’”¹⁴⁶

Texas laws permit establishing library taxing districts funded by “a sales tax or an ad valorem tax, or both, on property in the district,” if approved by an election.¹⁴⁷ Sales tax in San Antonio is already at the maximum 8.25 percent and support for an ad valorem tax is believed unlikely at this time.¹⁴⁸

PRINCIPAL CULTURAL HERITAGE PARTNERS AND PEERS

Bexar County Historical Commission

"The Bexar County Historical Commission was established in 1967 to preserve, protect, and promote the rich history of Bexar County. The Commission initiates actions and cooperates with state and local programs to encourage awareness of historic preservation and foster appreciation of Bexar County's historical significance. The Commission has five standing committees: Historical Markers, History Appreciation, Oral History, Historic Structures and Places, and Cemeteries."¹⁴⁹
<http://home.bexar.org/HistoricalCommission/Home.html>

Los Bexareños Genealogical and Historical Society

"Los Bexareños is an organization dedicated to Hispanic history and ancestral research. The Society promotes public interest in history and genealogy through outreach and educational programs. Members of the society consist of individuals from a variety of occupations and life pursuits (i.e. retirees, housewives, doctors, accountants and professional genealogists). The main activity of the Society is family ancestral research. Research that includes not only the family lineage, but also the family history and how our ancestors responded to national forces and events. How it was that we, their descendants find ourselves in this time and place. How decisions made long ago affected our present lives and in many cases directly account for our existence."¹⁵⁰
<http://www.losbexarenos.org>

Catholic Archives of San Antonio

"The Catholic Archives at San Antonio were begun by Sister Gertrude Cook, MSSA in 1974 under Archbishop Francis Furey. Its mission is to safeguard and preserve the sacramental records and other records of historical and enduring value as well as objects related to the development of the Catholic Church in the Archdiocese of San Antonio. In 1974 the archdiocese comprised of 32 counties in south central Texas."¹⁵¹
<http://www.archsa.org/archives>

City of San Antonio

Municipal Archives and Records

"The Office of the City Clerk Archives Program is located at the Municipal Archives & Records Facility. The Archives Program began in 2005 in partnership with the San Antonio Public Library's Texana/Genealogy department and the San Antonio Public Library Foundation. The program aims to appropriately house, organize, and make available for research the history of the City of San Antonio."¹⁵²
<http://www.sanantonio.gov/MunicipalArchivesRecords.aspx>

Daughters of the Republic of Texas Research Library at the Alamo

"The non-circulating collections pertain to the history of Texas, San Antonio, and the Alamo."¹⁵³
<http://www.drtl.org>

San Antonio Conservation Society

"The purpose for which the San Antonio Conservation Society is formed is to preserve and to encourage the preservation of historic buildings, objects, places and customs relating to the history of Texas, its natural beauty and all that is admirably distinctive to our State; and by such physical and cultural preservation to keep the history of Texas legible and intact to educate the public, especially the youth of today and tomorrow with knowledge of our inherited regional values."¹⁵⁴
<https://www.saconservation.org/About/Purpose.aspx>

San Antonio Genealogical and Historical Society

"The library houses a rich international collection of books, periodicals, maps and other materials. The library is open to the public four days a week—including weekends—with free parking."¹⁵⁵
<http://www.tsaghs.org/cpage.php?pt=38>

San Antonio Texas North Family History Center

"The Center has approximately 3,000 microfilms on location in the center. It also stores over 50,000 microfiche and has an extensive library of family history research materials on location. A well-trained staff is available to assist all interested patrons with family history research. . . . The Family History Center has six computers with access to the FHC Portal for use by patrons. We also have seven microfilm/fiche readers and a digital camera for copying images. All computers have access to printer."¹⁵⁶
https://familysearch.org/learn/wiki/en/San_Antonio_Texas_North_Family_History_Center

University of Texas at San Antonio

Libraries Special Collections

"The University of Texas at San Antonio Libraries preserve the legacies of San Antonio and South Texas through Special Collections featuring a rich array of primary resources."¹⁵⁷
<http://lib.utsa.edu/special-collections/>

Center for Archaeological Research

- Conduct archaeological research throughout Texas and the surrounding regions;
- Carry out archaeological surveys and excavations for federal, state, and local agencies as required by legislation and executive order;
- Provide public and private sector assistance and guidance regarding cultural resource management;
- Provide students with training opportunities in archaeological field contexts, laboratory, and technical writing; and
- Disseminate to the general public information about the history and prehistory of Texas and San Antonio.¹⁵⁸

<http://car.utsa.edu/AboutCAR/AboutCAR.html>

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APPENDIX 2

Maria Watson Pfeiffer
Completed Projects Utilizing Resources Located
at the San Antonio Public Library's Texana/Genealogy Department Since 2000

National Register of Historic Places and Registered Texas Historic Landmark nominations and Historic Tax Credit applications

Alamo National Bank
Alamo Stadium
Berman House
Blersch House
Brackenridge Park
Brady Building/Empire Theater
Burns Building
Carver Community Cultural Center
Dublin Plantation
Dullnig Building
Elias Edmonds House
Goad Cadillac Bulding
Herff Farm
Karnes County Courthouse
Jay Adams House
Mahncke Park
Maverick Building
Maverick Carter House
Milam Building
Monte Vista District
Old Bexar County Jail
Petroleum Commerce Building
Rand Building
Robert E. Lee Hotel
Saint Anthony School
San Antonio Drug Company
Toltec Apartments

Historic Sites and Structures Assessments and Reports
(unpublished with the exception of HABS)

Alamo Mill Dam, Historic American Buildings Survey (HABS) documentation
Pioneer Hall, Witte Museum, Historic Structures Report
St. Mark's Episcopal Church, Historic Structures Report
Pearl Brewery Historic Site Report
Main Plaza Site Analysis
Soledad Street Historical Analysis
VIA Westside Multimodal Terminal Environmental Assessment
Miraflares Master Plan
Ruiz House Historic Structures Report
Alamo Master Plan with FPC, Architects

Exhibits and Interpretive Signage

CHRISTUS Santa Rosa, Heritage Lobby exhibit
CHRISTUS Westover Hills, Heritage Lobby exhibit
San Antonio River Interpretive Signage- Headwaters to Espada Mission
San Fernando Cathedral, City Centre Museum
San Fernando Cathedral, Papal Visit 20th Anniversary

The Pavilion, permanent installation of historic photos
Pearl Stables, permanent installation of historic photos
Santa Rosa Hospital historical exhibit
Sunset Station, permanent installation of historic photos
Witte Museum, *Breathing Places: San Antonio Parks*
Witte Museum, *Water in Motion: Past, Present & Future of the San Antonio River*

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THE GENEALOGICAL
SOCIETY OF UTAH



APPENDIX 3

Affiliate Library Program

Genealogical Society of Utah /
FamilySearch™ of The Church of
Jesus Christ of Latter-day Saints

Affiliate Library Program

Circulation of Film to Public Libraries

The Church of Jesus Christ of Latter-day Saints conducts genealogical services and activities under the name of the Genealogical Society of Utah / FamilySearch™. The Society has been microfilming genealogical records since the 1930's. As a result of these efforts, the Society has amassed a collection of two and a half million rolls of microfilm. These films are circulated within a comprehensive library system consisting of the Family History Library in Salt Lake City, Utah and over

4,600 family history centers (branch libraries) worldwide. The family history centers exist to assist individuals in their family history research and the documentation of ancestral lines. The centers are located where they will serve a maximum number of people and reduce the costs and travel time associated with genealogical activities.

Interest in genealogy is increasing and, in many cases, family history centers cannot provide services to all those who desire them. In order to make these services available to more people, the Society has instituted an Affiliate Library Program for the circulation of microfilms to selected public libraries and institutions. It is felt that doing this will make the microfilms more useable and enable libraries to provide an additional level of service to their patrons. At this time, there are over 200 Affiliate Libraries with film circulation privileges. To be considered for Affiliate Library status and film circulation privileges your library must meet the following criteria:

- Your facility must be a library or institution that is open to the public and does not discriminate against any patron or group of patrons. The films must be available for use by all patrons.
- Having film circulation must benefit the genealogical community.
- Have staff that is knowledgeable in genealogy.
- Be a nonprofit organization.
- Provide your own microfilm readers and equipment.

If your library qualifies, your patrons and staff will be able to order any non-restricted microfilm or microfiche from the Society's collection just as family history centers currently do. Microfilm and microfiche loans are ordered and paid for online at <http://familysearch.org/films>. Short-term (90 days) and extended loans are available. Films can be returned to Distribution Services in Salt Lake City, Utah at any time. Return postage mailing labels are available at no charge.

Participating libraries sign a license agreement; this is required due to agreements signed by the Society with the archivists and record custodians whose records were filmed.

If you meet the above criteria, please send a letter describing the benefits your library can

offer to: Affiliate Library Support
15 E South Temple St. –
JSMB 3W Salt Lake City,
Utah 84150-3400

or e-mail to support@familysearch.org. Please provide your library name, address, contact name, phone number, e-mail address, and criteria information about the library. When your library is approved, we will send you a letter of notification and other documentation you will need to begin film circulation.

KD102698

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