PRESERVING AND USING HISTORICAL RESOURCES AT THE MARTINEZ HISTORICAL SOCIETY

A Thesis

Presented to the faculty of the Department of History
California State University, Sacramento

Submitted in partial satisfaction of the requirements for the degree of

MASTER OF ARTS

in
History
(Public History)

by
Deborah Hebert Lee

FALL
2015
PRESERVING AND USING HISTORICAL RESOURCES AT THE MARTINEZ HISTORICAL SOCIETY

A Thesis

by

Deborah Hebert Lee

Approved by:

__________________________________, Committee Chair
Patrick Ettinger, Ph.D.

__________________________________, Second Reader
Christopher Castaneda, Ph.D.

____________________________
Date
Student: Deborah Hebert Lee

I certify that this student has met the requirements for format contained in the University format manual, and that this thesis is suitable for shelving in the Library and credit is to be awarded for the thesis.

__________________________, Department Chair
Patrick Ettinger, Ph.D. Date

Department of History
Abstract

of

PRESERVING AND USING HISTORICAL RESOURCES AT THE MARTINEZ HISTORICAL SOCIETY

by

Deborah Hebert Lee

The purpose of this consultant’s report is to identify current archival best practices that will serve as a foundation for maintaining, preserving, and making accessible Martinez Historical Society’s (MHS) collections for researchers and the public. Applying current best archival practices will enable MSH to use their historical resources to their maximum benefit.

The report’s recommendations are based on current best practices literature from the American Association of State and Local History (AASLH), and Society of American Archivists (SAA) as well as the Historical Society of Pennsylvania online guide for small repositories, and other relevant literature.
This report outlines numerous recommendations based on current archival best practices, ranging from costly to relatively inexpensive. Top five recommendations have been listed in order to help MHS begin the process of instituting best practices to use their facility and historical resources to their fullest potential.

_________________________________, Committee Chair
Patrick Ettinger, Ph.D.

___________________________
Date
Preface:

This thesis details my involvement in a year-long consultation with the Martinez Historical Society regarding the management of their archival collections, which resulted in the production of a “best practices” consultant’s report for the MHS. My involvement in this project grew out of an internship undertaken with the Martinez Museum director Andrea Blachman in the summer of 2013, which I completed as part of my master’s degree program in Public History at Sacramento State.

I first learned of the Martinez Historical Society (MHS) while conducting historic research on the Martinez Masonic Temple for a Public History seminar. The Martinez Museum, which is governed by the MHS, contains an archival collection pertaining to the history of Martinez. I went to the museum in hopes of finding information pertaining to the Temple. Two of the museum’s volunteers located useful information regarding the Temple’s tile work, masonic newsletters, and a masonic booklet. Their attentiveness further directed my research efforts to the Contra Costa County Historical Society, which is located near the museum. The Martinez Museum director, Andrea Blachman, and the rest of the staff have a deep interest in local history, and made every attempt to answer research inquires necessary for the completion of the project.

The summer following the Martinez Masonic Temple project, I began a Public History internship at the Martinez Museum. During the internship I went to board meetings, assisted with oral history interviews, scanned photographs, and entered information into the Past Perfect Museum database. After completion of the internship, I
kept in periodic contact with the museum director to discuss museum events. After one of these discussions I decided to focus my thesis project on the MHS.

In September of 2013, I approached two of the MHS board members about focusing my thesis on an aspect of MHS. The original idea focused on designing a large research room, collecting city directories, and creating vertical files, that would contain obituaries, and information related to buildings and businesses. Around the same time, I consulted with two Public History faculty members about my idea. Professor Castaneda pointed me to several thesis projects related to historical organizations, and Professor Ettinger guided me to pertinent literature.

After exploring the museum’s collections in 2014, I decided that MHS did not need more material added to their burgeoning collections. MHS already had information that would be placed in the vertical files, therefore adding these files would be duplicating materials or cause unnecessary shifting of information to a new location. Attempting to locate past city directories proved to be a difficult task. MHS still needed a larger research room, but designing one no longer appeared to be an important priority.

In 2015, I began to focus on policies, preservation and accessing historical resources. The two MHS board members were informed of the changed focus of the thesis, and were intrigued. Professor Ettinger directed me to several sources of archival best practice literature. After a literature review, I determined that a consultant’s report on archival best practices would benefit MHS the most. Specifically with policies related to collections management, preservation management, and researcher accessibility.
Recommendations are based on current best practices from the American Association of State and Local History (AASLH), Society of American Archivists (SAA) literature, the Historical Society of Pennsylvania online guide for small repositories, and other relevant literature.
ACKNOWLEDGEMENTS

There are several people that I would like to acknowledge for helping me to complete my thesis project. I would like to thank Professor Ettinger for providing guidance throughout graduate school and on this final project, Andrea Blachman and Marlene Thompson for answering my incessant questions about the Martinez Historical Society and Martinez Museum, my husband Owen for believing in me, my son Harry for his well-timed study breaks to play and read children’s books, and finally my Dad whose own academic achievements have been an inspiration to me.
DEDICATION

I would like to dedicate this thesis project to my grandparents, Honey and Gran, who provided the economic support and initial motivation I needed to attend graduate school. This dedication is made with particular attention to my grandfather Honey, whose own wish to attend law school went unfulfilled.
# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td>........................................................................................................</td>
<td>vii</td>
</tr>
<tr>
<td>Acknowledgements</td>
<td>.................................................................................</td>
<td>x</td>
</tr>
<tr>
<td>Dedication</td>
<td>.....................................................................................</td>
<td>xi</td>
</tr>
<tr>
<td>List of Figures</td>
<td>....................................................................................</td>
<td>xiii</td>
</tr>
<tr>
<td>Chapter 1</td>
<td>A HISTORY OF LOCAL HISTORICAL SOCIETIES IN THE UNITED STATES</td>
<td>1</td>
</tr>
<tr>
<td>Chapter 2</td>
<td>THE HISTORY OF MARTINEZ, CALIFORNIA</td>
<td>13</td>
</tr>
<tr>
<td>Chapter 3</td>
<td>THE MARTINEZ HISTORICAL SOCIETY: ORIGINS, DEVELOPMENT, AND CURRENT ORGANIZATION</td>
<td>18</td>
</tr>
<tr>
<td>Chapter 4</td>
<td>PRODUCING THE CONSULTANT’S REPORT FOR THE MARTINEZ HISTORICAL SOCIETY</td>
<td>35</td>
</tr>
<tr>
<td>Appendix A</td>
<td>CONSULTANT’S REPORT: PRESERVING AND USING HISTORICAL RESOURCES AT THE MARTINEZ HISTORICAL SOCIETY</td>
<td>45</td>
</tr>
<tr>
<td>Appendix B</td>
<td>Martinez Historical Society Mission Statement</td>
<td>100</td>
</tr>
<tr>
<td></td>
<td>Martinez Historical Society Membership Benefits</td>
<td>101</td>
</tr>
<tr>
<td>Bibliography</td>
<td>........................................................................</td>
<td>102</td>
</tr>
</tbody>
</table>

xii
<table>
<thead>
<tr>
<th>Figures</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. A portion of the 1891 Sanborn Map of Martinez, CA</td>
<td>54</td>
</tr>
<tr>
<td>2. First floor diagram of the Martinez Museum</td>
<td>55</td>
</tr>
<tr>
<td>3. Second floor diagram of the Martinez Museum</td>
<td>56</td>
</tr>
</tbody>
</table>
Chapter I: A History of Local Historical Societies in the United States

Historical societies provide public spaces for people to learn, think, and reflect on local history. These spaces are important because they connect individuals to a physical location, and to a degree, give a sense of belonging to a community and even personal meaning. These spaces have not always been so welcoming, but they reflect the changing public perception of history and its role in American society.

In the beginning, historical societies had a dual focus. Their goals centered on “collecting the history and accomplishments of local residents and as well as national events.”¹ They accomplished these goals by collecting and preserving historical records, and documenting history.² The first historical society, the Massachusetts Historical Society, formed in 1791. Within a few years, several others organized including the New York Historical Society in 1804, and the American Antiquarian Society in 1812. Although these names reflected a state or national inclination, they represented a small segment of the population.

The historical societies were overwhelmingly managed by upper class, well-educated white males. They were lawyers, doctors, and reverends, but not professional historians. Their collections reflected their overall position in society, and the histories they published. Women, African Americans, and the working classes were not well represented in the historical record if at all. Their narrative would not be heard until well

into the twentieth century. As the nineteenth century progressed, a shift in historical societies began.

Many of the early historical societies found their geographical boundaries began to conform to their city limits. Urban historical societies reflected the movement of an increasing number of people relocating to the cities.\(^3\) For example, the Chicago Historical Society formed in 1856 and the Rochester Historical Society in 1860. Both societies had the name of the cities they represented in their titles, which reflected the focus of their collections. The number of historical societies steadily increased.

By 1860, creating a society had become a “national pastime.”\(^4\) For many, the establishment of a society or a historical organization meant an area had become “civilized.” Van Tassel explains in *Recording America’s Past* “The establishment of historical societies in the western territories was part of an unconscious effort to achieve cultural equality with the older states commensurate with the political equality assured them in the Constitution.”\(^5\) A fear of change resulted in the continued creation of historical societies.

In the essay *Visiting the Past: History Museums in the United States* Mike Wallace states that during the 1880s “Upper and middle-class men and women established

---

3 Franco, “In Urban History Museums and Historical Societies,” 308.
ancestral societies and historical associations in great numbers.”

This is a reflection of social and economic changes brought on by the increased numbers of immigrants and a discontented working class. In the American West, several historical organizations were created. The Society of California Pioneers formed in 1850. They wanted to maintain their historical claim to a physically and demographically changing landscape in their new location. The Native Sons and Daughters of the Golden West established in 1875 and 1886, formed with the intention to preserve their parent’s Gold Rush memories, and to set them apart from other people moving into the state. The roles of historical societies were about to change yet again.

By the turn of the century, historical societies were viewed as an educational resource. Franco explains “as history came to be regarded as a tool for uplifting society through public education, historical societies came to be seen as institutions of public education that could further this effort.” As immigration continued, the societies provided education and direction for the new comers. Again, societies allowed the local elite to maintain their identity in a changing world.

Between the 1940s and 1960s, urban renewal caused vast changes in the physical landscape. Numerous historic homes, buildings, and communities were being demolished.

---

7 Wallace, “Visiting the Past,” 139-140.
8 David Glassberg, Sense of History: The Place of the Past in American Life (Amherst: University of Massachusetts Press, 2001), 175.
9 Glassberg, Sense of History, 178.
11 Ibid., 310.
to make way for new construction. This is a period of time when many historical societies delved into the preservation of urban architecture. Numerous historical societies resulted from the need to preserve local historic buildings. Always changing, historical societies continued to play a part in American society.

In the 1970s, celebrations for the U.S. Bicentennial were widespread. The centennial ushered in a time period which celebrated U.S. history, and historical societies were active participants. In the essay “In State Historical Agencies, Museum and Societies: A Constant State of Change” Charles F. Bryan, Jr. explains the bicentennial “had a profound effect on historical institutions for years to come, particularly in seeing that large sums of money were poured into heritage related projects.” Historical societies continued to develop.

Social change over the past decade began to effect historical societies as well. For an extended period of time, the historical narrative excluded the majority of the population. Women, African Americans, and the poor were not visible. A larger portion of society began to demand an equal share of the historical narrative. Social history became the new normal. Historical institutions took notice and began to interpret the story of the everyday individual. Change did not stop there.

---

12 Ibid., 311.
14 Charles F. Bryan, Jr., “In State Historical Agencies,” 332.
By the 1980s, historical institutions were viewed as “parallel schools.”15 By this time, many had instituted an educational division. Institutional focus evolved from simply collecting and preserving the historical record, to actively engaging a wider range of the public in educational ways. For example, grade school tours of historical museums became commonplace. This new mode of operation not only increased historical societies and their museums’ public visibility, it gave them a stronger connection to the community. Internally, many historical societies were also reorganizing.

Societies are not known for their money making capabilities. Funding can be provided by private donations or public funding. At best, private donations can be tenuous and public funding can be competitive. Historical institutions were finding they had to discover new ways to attract income. Increasingly, they began to depend on entrance fees and membership dues.16 Many looked at their internal organization, and tried to find ways to function more efficiently. An example of this new direction can be seen in the Chicago Historical Society.

Between the 1970s to the 2000s, the Chicago Historical Society experienced numerous changes in order to adapt themselves to the changing times. Their mission statement, collecting scope, exhibitions, staff, organizational hierarchy, and business model altered drastically. The mission statement and collection scope changed to accommodate a wider circle of Chicago society. The number of exhibitions increased with new interpretations. Input started to come from more staff members when

15 Ibid., 336.
previously they were created by just one curator. Exhibitions also began to be designed with disabled patrons in mind. Collections became accessible online. They began to hire professionally trained staff were hired. Grant writing became common. The society began to follow a corporate model. According to Lewis, the success of the Chicago Historical Society guided other “institutions to reinvent themselves.”\(^{17}\)

In an attempt to encourage public visitation and to take advantage of heritage tourism, historical societies have developed another adaption, history centers. Because space is typically limited in a society’s museum, a history center allows opportunity for a larger space, therefore accommodating more people. Heritage tourism “provide(s) authentic and educational experiences for a sophisticated audience of travellers who find local heritage an important part of travel.”\(^{18}\) Often travelers will plan trips geared toward a new and interesting educational experience. An example of a society using this new development is the Atlanta Historical Society. In 1993, they opened the Atlanta History Center. The center is located on thirty three acres and contains permanent and temporary exhibits, two historic homes, a large research center, with extensive gardens and trails. Historical societies still face many challenges.

Throughout the years of their evolution, historical societies have confronted several challenges. One of the biggest challenges is maintaining an adequate budget. Most budgets are small which results in an underfunded society. This in turn can cause a host of problems from backlogged inaccessible collections to inadequate storage supplies.

\(^{17}\) Lewis, *The Changing Face of Public History*, 34.
\(^{18}\) Franco, “In Urban History Museums and Historical Societies,” 321.
and facilities. The issue of underfunding can be found repeatedly in budget reports and society histories.

Societies can obtain monetary funds from a variety of sources: federal or state grants, private donations, membership dues, fundraisers, or selling excess items within their collections. Acquiring adequate funding has been a perpetual issue among societies. According to a 1962 study, the Massachusetts Historical Society, the first historical society in the United States (1791), dealt with a “lack of funds for acquisitions, cataloguing, and binding (that) have led in the past to improvisations of a vexing sort.”

Currently, MHS funding is provided by private donations, fundraising events, federal and state institutions. In 2014, the society received over $1 million in donations.

The California Historical Society (CHS), formed in 1871, was not financially viable until 1922 when Templeton Crocker donated the necessary funds for the society to survive. A 1962 study states that the first forty years of the society suffered from a dearth of funds. The 2011-2013 CHS annual report states that they currently have fiscal issues. Another consistent problem is adequate staffing.

---

Different historical societies have different staffing needs. They can be staffed with paid professionals, with a few volunteers, or can be fully staffed by volunteers. MHS has a history of limited staffing.\textsuperscript{24} For example, they did not have a “paid librarian until 1918.”\textsuperscript{25} At that point, they had been in existence for 127 years. Currently, MHS has fifty employees. A 1962 report states that the CHS has a limited work force. \textit{Currently, CHS is handled by a paid staff. In a recent annual report, CHS mentions having limited staff.}\textsuperscript{26} Another perpetual problem is a lack of space.

Because most historical societies are typically located in historic buildings, space is limited. When starting out, many societies simply rented out a room or rooms in a large building until sufficient funds accumulated to purchase a building. Even then, many societies moved several times in order to accommodate growing collections. MHS has resided in numerous different locations. The current location is the Boylston Street building. Constructed in 1899, the original building has undergone renovations and additions to contain the overall growth of the society. CHS has been housed in several separate locations including several different rented rooms, the Whitter Mansion, and its present location in a building in downtown San Francisco. Another problem many societies face is an underdeveloped mission statement.

A well designed mission statement helps a historical society maintain focus on its goals, and prevents them from randomly collecting unrelated historical resources. This in turn saves valuable and limited space. When historical societies first formed in the

\begin{thebibliography}{9}
\bibitem{} Whitehill, \textit{Independent Historical Societies}, 18.
\bibitem{} Ibid., 19.
\end{thebibliography}
eighteenth century, they depended on a simple statement of purpose to define themselves. By the twentieth century most of them began to develop a mission statement. The 1794 incorporation charter for MHS stated the society’s purpose:

“collection and preservation of materials for a political and natural history of the United States.”27 The current mission states that the society “is an independent research library that collects, preserves, makes accessible, and communicates manuscripts and other materials in order to promote the study of the history of Massachusetts and the nation—a mission it has pursued since 1791.”28 MHS evolved from strictly collection and preservation to include encouraging accessibility of its documents.

The original incorporation charter for the CHS states their purpose “is to collect, preserve and diffuse information related to History.”29 The current CHS mission is “to inspire and empower people to make California's richly diverse past a meaningful part of their contemporary lives.”30 The mission evolved from no mention of the public to wanting the public to use historical resources for the betterment of their lives. Because historical societies focus on local history, this area needs to be examined as well.

Over the years, there have been several criticisms of local history. This type of history tends to overly promote a community rather than critically examining an area’s weaknesses. For example early local histories would overstate an area’s opportunities, healthfulness, and mild climate in order to attract new residents.31 Second, an emphasis on founders and the elite eclipsed those on the edges of mainstream society.32 For example, when early Americans wrote their towns’ history, the local Native American population, women and African Americans tended to be left out of the narrative leaving the impression that they did not exist.33 A third criticism is that local history is only concerned with early events and genealogy, and rarely reflects on the typical or current events of an area, or their causes and consequences.34 By concentrating only on an area’s beginning, an unknown flow of events is completely left out of the narrative. These missing people and events could give a fuller understanding of a community’s history. A last criticism of historical societies is indiscriminate collecting without fully grasping future historical needs.35 Sometimes items are collected simply because they are historical, and do not fit the needs of the society’s mission or collecting scope. Or items are not collected because the potential evidential value is overlooked.

The basic purpose of historical societies has steadily evolved to be a comprehensive organization that is more inclusive of their particular community. There

32 Kammen, On Doing Local History, 7.
33 Ibid., 4-6.
34 Ibid., 18.
is an overall emphasis to collect, preserve, share and interpret their collections. Scope, size, and structure vary with each organization. Formation occurs at the state, county, and city level with incorporation charters granted by the state. Most societies function on a small scale and budget with a museum, an archival collection, and a research room or library.

Small historic house museums, which are frequently operated by historical societies, have been the subject of recent discussion. Because of the numerous challenges they face, such as struggling with limited space and funding, outside competition, ubiquitous nature, and an older generation of volunteers, some wonder if they should remain open.\textsuperscript{36} At a 2013 conference for the National Trust for Historic Preservation Stephanie Meeks pointed out “in 2002, the average house museum incurred a cost of $40 per visitor but only took in $8 per visitor.”\textsuperscript{37} Anyone can see the cost difference is not feasible. A recent book by Donna Harris \textit{New Solutions for House Museums} offers several ways to address this concerning problem. Of course, there are many thriving historic house museums.


The subject of this thesis is the Martinez Historical society, which operates a small, urban, historic house museum. Over their 42 year history, they have faced some of the same challenges as other historical societies. Limited funding is provided by donations, membership dues, fundraisers, grants, and retail sales. They consist of a dedicated group of volunteers with no paid staff. Because they are housed in a medium-sized historic house, they are limited by space which is divided between museum exhibits, a resource room, and storage space. Despite these limitations, Martinez Historical Society plays an active role in their community.

The evolution of historical societies is a story of adaptation. From short-term to long-term challenges, historical societies have learned to thrive and create a sense of community in world that is constantly in flux. Their continued adaptation will ensure a historical narrative that will touch future generations.
Chapter II: The History of Martinez, California

Martinez, California, founded in the mid-nineteenth century, is located in Northern California’s Alhambra Valley, originally known as the Arroyo el Hambre, thirty six miles northeast of San Francisco. Native Americans, Spanish, Mexicans, and Americans have inhabited this area. Martinez has been significant in the areas of transportation, shipping, agriculture, fishing, and oil refineries. Today, the city is bounded by the Carquinez Strait to the north, numerous regional parks, and a water bird preserve. State Route 4, and Interstate 680 run within the city limits. Martinez today is a sprawling bedroom community with a large stock of historic homes.

The Karkine Indians were the first known inhabitants of this area. They were one of the many tribes that composed the Ohlone Indians also known as the Costanoan. The term Costanoan evolved from the Spanish term “Costanos or Indians of the Coast.” The Ohlone/Costanoans had inhabited the San Francisco Bay Area for approximately 10,000 years before European exploration. Their tribal group extended from “San Francisco Bay south, to Monterey Bay, the Big Sur Coast, and the San Benito River drainage.”

---

The Spanish first explored the San Francisco Bay Area in 1769 with the Don Gaspar de Portola Expedition, and then again in 1776 with the Anza Expedition. The latter expedition traveled through the area that would become Martinez. A permanent Spanish presence commenced with the establishment of the military base, the Presidio near the Golden Gate Strait. Ygnacio Martinez, a commandant of the Presidio, played a prominent role in the development of the city of Martinez.

Martinez, for whom the city is named, received the Rancho El Pinole land grant in 1842 from the Mexican government. His land grant consisted of 17,000 acres, and bordered west along the Alhmabra Creek. East of the creek, Rancho Las Juntas, belonged to William Welch. Welch, a Scottish sailor, received the land grant in 1844 that consisted of 13,000 acres. From both of these ranchos, the city of Martinez would later emerge.

Key events quickly transpired to establish Martinez. A ferry service started in 1847 that connected Martinez to its neighbor to the north, Benicia. Then in 1849 the Gold Rush began. These two events literally put Martinez on the map. The ferry service enabled individuals to easily transverse the strait on their way to the Sierra Nevada foothills from San Francisco. Excited by the number of people using the ferry service, Colonel William

---

44 Ibid., 10.
46 Ibid.
47 Ibid.
48 Ibid., 7.
Smith had the area surveyed “for the purpose of forming a town.”49 Martinez officially became a city in 1849, became the county seat in 1850, and was incorporated in 1879.

Martinez flourished. An agriculturally productive area, grain, fruit and nuts grew in abundance. With products to sell and a convenient local port, the shipping industry thrived. Local businesses blossomed. In 1878, the transcontinental railroad began service to the city, which opened up new opportunities for growth.50 During the 1870s, Italian and Sicilian immigrants began to fish in the strait.51 The robust industry created the need for two local canneries.52 Public services to the city began including telephone, natural gas, electricity and water.53 Several prominent local citizens began to emerge.

One of these citizens, Dr. John Strentzel, developed horticultural techniques, which he employed on his Martinez ranch.54 In 1881, he built an Italianate home on the ranch for himself and his family. One of his daughters would later marry John Muir, the naturalist and Sierra Club founder, and the house would become theirs in 1890. Muir lived in the home with his family until his death in 1914. The property is now a National Historic Site and is operated by the National Park Service. During his

50 Ibid., 21.
residence on the ranch, John Muir was active in the conservation movement and wrote extensively about his travels and observations of nature.\textsuperscript{55}

As the twentieth century progressed, new industries began that would change the physical landscape once again. The Mountain Copper Company established itself in 1905, and Shell Oil in 1915.\textsuperscript{56} At the time, the Shell Oil refinery “was the largest in the United States.”\textsuperscript{57} Shell Oil is still a major employer in the area today. Agriculture gradually declined as the fields transformed into housing to support the growing population brought in by the new industries.\textsuperscript{58}

Years of growth and prosperity produced an array of new homes and buildings in various architectural styles. Styles ranged from the ornate Queen Anne to the earthy Arts and Crafts. Construction consisted of mansions to simple homes, and public buildings. Martinez continued to grow.

The construction of roadways soon intervened to divert traffic away from Martinez. The construction of State Route 4 in 1934, and Interstate 680 in 1955 aided in the transformation of Martinez into a post-World War II bedroom community. Today, the community has spread extensively to the south of its historic downtown.

By the 1960s, the Martinez physical landscape began to change yet again. Contra Costa County, another major employer in the area, needed new offices.

\textsuperscript{56} Martinez Historical Society, \textit{Images of America: Martinez}, 8.
\textsuperscript{57} Ibid., 57.
\textsuperscript{58} Martinez Historical Society, \textit{Martinez: A California Town}, 51.
Numerous historic homes in the downtown district were demolished to provide space for the new construction.\textsuperscript{59} Despite this period of urban renewal, Martinez still has a sizable stock of historic homes.

Martinez has a rich and varied history. It has been the home of diverse groups of people and occupations. The city’s history is reflected in its people and changing economic base. Today, the city remains a valuable resource of historic homes, buildings and local history.

\textsuperscript{59} Martinez Historical Society, \textit{The Borland Home}, 10.

The Martinez Historical Society is a non-profit organization that governs the Martinez Museum. The society and museum are dedicated to preserving and sharing local history. They have a governing body, numerous committees, plentiful activities and extensive collections, which combine to place them in a unique service to their community.

The museum is located in the Victorian Era Borland Home, a two-story Eastlake/Stick style home built in 1890 at the corner of Escobar and Court Street in downtown Martinez. In the early 1970s the home, then owned by the Contra Costa Community College District, had been marked for demolition for a new parking lot.60 The previous decade Martinez residents witnessed the demolition of numerous Victorian Era mansions and smaller homes in this same area to make way for county offices.61 Fortunately for the Borland Home, a locally retired citizen named Al Perry walked past the home on a spring day in 1973.62 “As he passed by the old Borland home, Perry paused to consider what he was viewing—what it was, what it was about to become and what it could be.”63

Support for preventing the demolition of the building and its reuse as a local history museum quickly grew. Perry, his spouse Charlene Perry, and several

---

61 Ibid., 10.
supporters enlisted the backing of Mayor John Sparacino. During a meeting in August composed of “county, city and college officials and concerned citizens”, the district agreed to postpone demolition. On November 29, 1973 the Martinez Historical Society officially formed with Al Perry as interim chairman and president, and Monroe Stinson as interim secretary. Seven volunteers formed the Board of Directors: Gene Vallejo, Pauline Boardman, Barbara Benedict, Wakefield Taylor, Ken Dothee, Justice A. F. Bray Sr., and Lee Walton. With the formation of the society, even more work lay ahead.

In February 1974, the college district again agreed to postpone demolition of the building to allow MHS to register themselves as a non-profit organization, and “to join the City of Martinez in taking responsibility for the building on its present site.” During the fall of the same year, the college district began to lease the building to the city. Restoration of the house began in March, and took two and a half years to entirely complete. The MHS Articles of Corporation were completed April 1975.

A dedication ceremony on June 6, 1976 opened the first floor of the museum to the public. The dedication corresponded with the ongoing and widespread

---

65 Ibid., 10.
67 “Proceedings of Meeting,” 3.
69 Ibid., 12.
events of the United States Bicentennial. The remainder of this chapter provides an overview of the MHS at the time of my thesis research.

**Governing Body**

MHS bylaws were created with the Articles of Incorporation in 1975. They have become more sophisticated over time, and have been revised several times in 2000, 2004, 2012, and 2013.70 Article III of the most recent bylaws discusses the governing body: “A. The Society shall be governed by a Board of Directors, (herein after referred to as the Board), composed of fifteen (15) members in good standing at the time of their election. B. The term of the each Director shall be for two (2) years. Approximately one-half of the members of the Board shall be elected each year. The Board may periodically reconfigure existing terms to ensure the balance. Directors may be re-elected to another two-year term in accordance with Article VII. C. Officers of the Society shall be President, First Vice-president, Second Vice-president, Recording Secretary, and Treasurer—all of whom shall be members of the Board. Term of office shall be one year with elections annually.”71 The bylaws spell out the duties of each officer. The current president is John Curtis, first vice president is Lita Gloor-Little, and second vice president is Paul Kraintz.

There are number of standing committees, including finance, financial review, landmarks, membership, museum, program, publication, and scholarship. Funding is provided by membership dues, donations, fundraisers, grants, and

---

retail sales. Their largest source of income is provided by the annual Martinez Home Tour, and their largest expense is the annual Martinez Home Tour and building maintenance.72 The MHS staff, board members, and docents are all volunteers.

Policies

MHS has three policies in place. These include a mission statement, acquisition policy, and a deaccession policy. An update to the mission statement occurred in 2014,73 which is similar to its initial creation in 2004.74 The original mission statement read, “To Educate the community about Martinez history. To arouse interest in the study of history. To promote an appreciation in the community that the past determines the present era- and that through study of our history we can plan for a better future.”75 The updated mission statement states, “To educate the community about history. To arouse interest in the study of history.” This change occurred to simply truncate the statement.76

Another change to the mission statement involved what the MHS will display. The original mission statement read “To Display the Society’s collection for the benefit of the public.” The update mission statement states, “To Display

72 Martinez Historical Society, “Budget vs. Actual-Year-To-Date 1/1-8/12/14,” Martinez Historical Society, Martinez Museum.
74 John Curtis, e-mail message to author, July 13, 2015.
76 John Curtis, e-mail message to author, November 7, 2015.
owned, borrowed or leased collections for the benefit of the public.” This change occurred to permit the use of traveling exhibits.77

The acquisition and deaccession policy have not been updated since their creation in 1994. The acquisition policy needs to be updated to flow with the mission statement, and needs to state specifically what MHS will and will not collect. The following is the current acquisition policy:

1. Acquisitions of material for the museum collection by gift should be consistent with the Museum Purposes and Goals. Material should be of local or regional significance and usable for exhibit or educational programs.

2. An active and ongoing program for acquisition of such material should be carried out by Museum staff.

3. Before materials are acquired, consideration should be given to the Museum’s ability to care for, store and use the material.

4. Acquisition of material should comply with all legal restrictions associated with the material source, ownership, copyrights, etc.

5. Title to material, authenticity, history and any restrictions as to its use will be made clear, using the Museum Gift Agreement. Restrictions on use of material should be avoided unless those restrictions are acceptable to the Director.

6. The acquisition procedure will include:

77 John Curtis, e-mail message to author, November 7, 2015.
• Acceptance by the Director who will have the option of returning the object or material to the donor if, in the absence of the Director, the object or material has been conditionally accepted by another member of the Museum staff.

• A systematic and complete record keeping system.

• Monthly reports to the Museum Board on acquisitions.

• A signed Gift Agreement should be completed upon acquisition of any donated material.

The deaccession policy also needs to be updated to flow with the mission statement, and needs to clearly describe the steps in the deaccession process. The following is the deaccession policy:

1. Material may be deaccessioned from the collections when the following conditions are met:

   • There are no legal restrictions to the contrary.

   • The material is no longer relevant or useful to the Museum.

   • The material is of historical value to some other institution.

   • The Museum cannot properly care for the material.

2. When necessary, an appraisal of the objects will be obtained; for instance, if space or need no longer exists and sale is considered.

3. A signature on our Gift Agreement allows the Historical Society to display, care for, sell, trade or dispose of an article without restriction; and, further, no return of the article to the donor or his or her heirs.
4. The deaccession procedure will include record keeping requirements compatible with the acquisition procedure.

5. Procedure for Deaccessioning will be presented to the Museum Board.
   A. Recommendations for the deaccession will be presented to the Board by the Director. Those recommendations will include:
      - A list of materials.
      - Reason for deaccession.
      - Method of deaccessing.
      - An appraised value if necessary.

   B. The Museum Board will take action on recommendations.

Activities

MHS is involved in a wide range of activities that bolster local history, including an oral history project, tours, fundraisers, landmark installations, lectures, a scholarship fund, and publications. The Oral History Project of Martinez and Alhambra Creek Watershed documents residents of the Martinez area who have witnessed the city evolve over the years. Interviews have focused on World War II, Korea and Vietnam veterans, as well as Shell Oil employees. Tours include the annual Martinez House Tour, a walking tour of downtown Martinez, and a cemetery tour. There is an annual crab feed that is a social and fundraising event. The history society has placed landmarks at historic buildings including the 1901 Finance Building, the 1931 Contra Costa Court House, and the 1937 Martinez Post Office Building.
MHS is involved in several other activities as well. History lectures are given by volunteers and are held at a local senior center and at the museum. Topics include “Riding the Rails,” “The Italians of Martinez,” and “Celebrate and Commemorate the Martinez Canteen.” A scholarship fund is provided for Alhambra High School seniors who plan on majoring in history in college. MHS publications include The Borland Home: A History of the House and a Guide to the Museum, Martinez: A Handbook of Houses and History, and To All Enquiring Friends: Nantucketers in Martinez and San Francisco, CA. 1851-1863 by Ruth E. Sutter. The society is very active in the local community.

Museum

The Borland Home is named for the couple James and Emma Borland.78 A locally important individual, Mr. Borland initiated telephone service, natural gas service, electricity, and a water supply into Martinez during the late nineteenth century.79 The Borland’s inherited the house from Emma’s father Dr. John S. Moore. The home, originally built for Dr. Moore and his family, had been used as his family residence and for his dental practice.80

With the passing of his wife, Mr. Borland sold the home to his brother Robert Borland. Robert Borland and his family lived in the home until his death in the 1930s.81 The home was sold and resold, and used as rental property.82

79 Ibid., 5.
80 Ibid.
81 Ibid., 5-6.
82 Ibid., 6.
Contra Costa Community College District bought the building in 1949. The college district continues to own the building with MHS subleasing from the city.

The Martinez Museum is housed in the two-story late Victorian Era Stick/Eastlake Borland House. The T shaped house incorporates three gables, with an exterior wood façade. The exterior is painted predominately a light yellow with white, light blue, and burgundy accents. The exterior has numerous and various ornamental brackets, multi-shaped fish scales, and an intriguing flower motif, which to this author is reminiscent of a Scottish thistle. The museum is approximately 2200 square feet, and consists of two floors with an interior wood staircase. Having the museum in a historic home is a fitting statement of the historic character embodied in the community.

The public accesses the museum through a small wrap porch that leads to the front door. The first floor consists of three main exhibit rooms: the Front Parlor (15' x 15'), the Dining Room (11' x 15'), and the County Room (15' x 10'). On entering the museum, the visitor steps into a small foyer (6' x 10'). From here, they can turn right into the Front Parlor, or proceed forward to the staircase to the second floor, or go straight into the County Room. From the Front Parlor the visitor proceeds into the Dining Room. From here, the visitor can proceed straight into the research room, or turn left into the County Room, which would lead the visitor back to the small foyer and the front door. The exhibit cases in each of the rooms are composed of wood and glass. The windows throughout the majority of the building contain sheer curtains and a half shade.

---

83 Ibid., 7.
84 Ibid., 11.
Toward the back of the house, a cement block lined vault (10' x 11') and a small bathroom are located to the left of the resource room (13' x 12'). The vault storage is lined with wood shelves and contains metal filing cabinets. Historic resources are stored in a variety of ways. The majority are housed in archival grade acid-free boxes. Assessor’s ledgers are stored vertically on wood shelves. Documents are in acid-free folders in the metal filing cabinets.

A small kitchen and back entrance/exit are located to the right of the resource room. The resource room contains wood shelves, wood bookcases, and wood cabinets. There is a large wood work table. Volunteers use a computer and modern computer table in the corner of the room. The windows in this room are lined with blinds. Visitors move to the upstairs via an L shaped wood staircase located in the front foyer.

The second floor encompasses four main exhibit rooms: Barbershop (8' x 7'), Waterfront (11' x 11'), School Room (8' x 15'), and Olden Days (15' x 7'). Once upstairs, the visitor is greeted by the Barbershop room visible from the landing. This room is not original to the building. Located on the left is the Waterfront room. Located to the right of the Barbershop is the School Room. Proceed down the corridor, and the visitor enters the Olden Days room. The exhibit cases in each of the rooms are composed of wood and glass. There have been a few additions to the building.

Several of the rooms are not original to the house. These include the resource room, bathroom, kitchen, and Barbershop. The exact dates of these additions are unknown. According to an assessor’s record, interior remodeling occurred in 1940 and the house had
2114 square feet.\textsuperscript{85} When the Contra Costa Community College bought the house in 1949, they remodeled a portion of the interior. Once the building came under the care of MHS, they restored the interior to its original condition.\textsuperscript{86} Because the building is a historic home, it is missing a key modern addition.

The museum does not have central heating and air conditioning. Several items are stored in a humidity-and-climate controlled storage in Richmond. This is a secure storage unit that the museum shares with the city of Richmond. Andrea Blachman states that original audio and VHS tapes are stored in the humidity-and-climate controlled storage with the digitized copies at the museum. Eventually the assessor and cemetery books will be stored in humidity-and-climate controlled storage.\textsuperscript{87} An addition to the building is currently in process.

The Contra Costa Community College District is installing a foundation under the museum. Currently, the building is directly on top of the ground. A foundation will provide structure and support to the building, and increase the safety of volunteers, visitors, collections and exhibits within.

The museum exhibits present a broad history of Martinez by displaying historical objects, photographs, documents, and ephemera. General displays have a written description. Displays showcasing a major collection have a description and the donor name attached. The majority of the rooms represent a significant, although not strict, theme of Martinez history, which can be delineated by the name of the room. The Front Room has a

\textsuperscript{85} \textit{“Assessor’s #118-30-65503,”} Building Folder 1976-78, Martinez Historical Society, Martinez Museum.

\textsuperscript{86} Martinez Historical Society, \textit{The Borland Home}, 7.

\textsuperscript{87} Andrea Blachman, phone interview by author, October 22, 2015.
general historical focus. For example, there is a painting of the Carquinez Strait and a shoe bench from a local store. The Dining Room has a dining table, a harmonium, and portraits of the Martinez and Welch families. Many of the items are similar to what would be found in a dining room. The County Room has items related to Contra Costa County history, which is composed of nineteen cities including Martinez. Examples of items in the room include a courthouse bell as well as a display about the nearby 1944 Port Chicago explosion.

The museum exhibits continue on the second floor. Since Martinez is located along a waterway, having a Waterfront room is an appropriate representation of this activity. There are fishing nets, ephemera about the Martinez-Benicia Bridge, and a schooner painting. The School Days has diplomas and band equipment related to the Alhambra High School. The Olden Days room is a general historical representation. The room has vintage photographs, fireboxes, and household appliances. The Barbershop is a portrayal of a typical nineteenth century barbershop. The exhibits display only a portion of MHS’s collections.

Collections

MHS has a wide variety of historical resources that contain valuable information for researchers and the general public. These resources showcase the development of Martinez over time. The collections contain numerous documents, photographic materials, artifacts, maps, and books. The resources are housed in the resource room and the vault. Inventories of the resources are kept in a variety of ways.
Documents include family papers, which are valuable for genealogical research. There are numerous black-and-white photographs and negatives, which give an eye witnessed account of the growth of the city from dusty roads to paved streets, from wagons to vintage cars, from vast fields to the development of homes and businesses. The photographic materials are stored in archival-grade sleeves and folders. Besides photographs, MHS has various artifacts.

One of the museum’s most prized possessions is the Perryman Native American artifact collection. Included in this collection are burial beads, pendants, bone tools, bird bone flutes, projectile points, and finished tools belonging to the Ohlone tribe. They were one of the earliest occupants of the Martinez area, and this collection is a fitting addition to demonstrate the full breadth of the city’s history. These artifacts are stored in archival grade boxes. MHS also has a large map collection. The bulk of the maps, which are Sanborn Fire Insurance maps, are contained in a metal map case. These present a wealth of information for the location, components, and dates of buildings and infrastructure. The books include telephone directories, high school yearbooks, and assessor records, all rich resources for locating people within a certain time and place. The public is allowed limited access to the collections.

The resource room is open during museum hours. Tuesday and Thursday 11:30 am to 3:00pm, and the first four Sundays of the month from 1:00pm-4:00pm. The volunteer staff answers researcher questions from on site visitors, by telephone, and by email. The resource room is the location for researchers and
volunteers to complete their tasks. Resource room policies and procedures do not exist at this time. Researchers are not allowed access to the vault. Only volunteers are allowed to locate the various resources.

Inventories of historical items are kept in five different ways, and all contain similar information related to the item’s description and location. The first three inventories, the master index binder, the two accession books, and the half sheet binder appear to be used the most. The fourth indexing system, the Past Perfect museum database is used by a limited number of volunteers. The last indexing system, the reference cards appear to be used the least. The different formats began at different times and reflect the different styles of their creators. All of the inventories, except the database, are handwritten.

The first system, a master index binder, lists the location of three categories: photographs, paper, and boxes. Within each of these three overall categories are the main headings. Depending on the volume of information in the main heading under the photograph and paper categories, they are further divided into subcategories. In the binder, roman numerals designate the number of file folders available for each subcategory. An example from the index binder is the main heading for War. The subcategories include I-Civil, II-Desert Storm, II-Red Cross, which means that under Civil, there is one folder, under Desert Storm there are two folders, and under Red Cross there are two folders. Because the boxes category lists artifacts, a number, and a brief description delineate them. An example from this category is Box#20 and refers to Ladies Garments.
The second indexing system, began in 1978, includes two handwritten accession books. These two books contain every item that has been catalogued. The following information is entered for each accession: accession number, date received, cataloguer, description, how acquired, name of donator, address, condition (no longer applicable), and a catalogue number. Each catalog number has three identifying numbers separated by periods. Here is an example from the photographic section of the Sharkey Collection accessioned in 2014. The first photograph in the collection is assigned the accession number 2014.1.1. 2014 is the year of accession. The number 1 in 2014.1 signals that the Sharkey collection was the first collection accession in 2014. The last number 1 in 2014.1.1 signals this is the first photograph accessioned in that collection.

The third indexing system is the half-sheet binder. It is a more detailed description of the items entered into the accession book. If there are eight photographs in an accession, this binder provides information about all eight photographs including present location. The location is derived from the master index file. MHS plans to always keep these indexing systems as a back up to the Past Perfect database.

The fourth indexing system is the Past Perfect museum database. The volunteer staff is currently cataloging artifacts, objects, photographs, and negatives into the Past Perfect Museum database. With each entry, a date, measurement, description, and key terms are assigned to each item. The museum needs to have one overall index, and Past Perfect will help to achieve this goal of
having a single comprehensive index. Researchers currently do not access the database.

The fifth indexing system consists of three boxes of alphabetically arranged 3 x 5 reference cards, which provide a quick source of information. The cards provide information about the subject, and in some cases provides the location of an item. Subjects include hotels, businesses and wineries. An example of a card includes the name of the building, street address, demolition date, geographical location, and the name of the new business.

A & W Root Beer Bldg.- 3500 Alhambra Avenue.
2. Situated at S.W. corner of G Street and Alhambra Avenue.
3. A new business was built “Spee Dee Oil Change and Tune Up.”

Another reference card example states the name of the business, general location, demolition date of the building, the building’s replacement, and the location for more information can be obtained in the photo files, which is a category in the master index binder, under the subcategory, businesses.

A.A.A. Office- Escobar and Court
2. Photo Files- Businesses

MHS has evolved from a handful of board members to a fifteen-member board with numerous volunteers and activities. With a limited budget and

88 Andrea Blachman, phone interview by author, October 22, 2015.
resources, MHS maintains an urban historic house museum with an extensive collection of historical resources. They have made themselves an asset to their community by promoting local history through active area engagement, their exhibits, and making their collections accessible.
Chapter IV: Producing the Consultant’s Report for the Martinez Historical Society

The final consultant’s report diverged significantly from the original intention. Over the course of the past year, I familiarized myself with MHS’s governance, policies, collections, exhibits, and building. I conducted research into archival best practices related to collection management policies, preservation management policies and researcher accessibility. I focused on these three topics because they appeared to be the most relevant to MHS because they either did not have these policies in place or they simply needed to be updated.

The first meeting with Andrea Blachman, the museum director, and John Curtis, the board president, to discuss the project occurred in September 2013. Initially, this project encompassed the author as a historical consultant with the aim of creating a researcher room, vertical files of readily available historical documents, a comprehensive collection of local telephone directories, and a way for people to conduct research online. The research room would be strictly used for researchers instead of being a shared space with volunteers. The vertical files were to include obituaries of locally prominent residents, information on civic and residential buildings including architecture, materials, and the architect. Newspaper articles were to be on local events such as openings and closings of local businesses and restaurants. Last, I would have located telephone directories for the years that are currently missing at the museum. These ideas were inspired by personal experience at the Sacramento Room at the Sacramento Public Library, and the Center for Sacramento History. My initial ideas started to change.
Once I began researching archival best practices, however the project started to take a different direction. The project began to focus more on what MHS needed to do to make the existing facility a richer version of itself. An assessment conducted of MHS’s policies and the facilities, specifically the vault, resource room, and the exhibit rooms, helped me to understand their present situation. Recommendations began to formulate around three distinct areas related to collections management policies, preservation management policies, and researcher accessibility. I notified the museum director of the changing direction, and she concurred.

My research on archival practices included reading numerous books and articles recommended by the Sacramento State Public History faculty. I also retrieved books that were assigned to me while taking the Archives and Manuscripts Seminar. Books published by the American Association for State and Local History (AASLH) and the Society of American Archivists (SAA) provided a wealth of information for this project. The SAA website not only provided a valuable online source for best practices and code of ethics, they share policies that museums and archives are currently implementing. In addition, the Historical Society of Pennsylvania has a section on their website “Resources for Small Archives” that lists helpful books about archival best practices. They also have pdf presentations geared to small repositories on archival issues.

In order to be a strong archival repository, carefully articulated policies are vital. In Nearby History: Exploring the Past Around You David E. Kyvig and Myron A. Marty note that “the first standard for judging any repository must be the strength of its
commitment to preserving and making accessible its holdings.”

An overall collection management policy, which includes a statement of purpose, a mission statement, an acquisition policy, a collaborative collecting policy, and a deaccession policy, would showcase this commitment in written form. The MHS did not have an overall collection management policy nor a collaborating collecting policy, but it did have mission statement, last updated 2014, and an acquisition and deaccession policy, both updated in 1994. Based on my research, I concluded that MHS needs an overall collection policy with updated individual policies allied to the society’s overall mission.

Policies need to connect themselves to each other through the use of similar language to demonstrate continuity of thought. According to Dearstyne, a statement of purpose “defines its legal status and authority” and “usually this is part of, or at least closely related to, the charter of the parent historical agency.” MHS has a statement of purpose that is a single page in length within the incorporation articles. I came to the conclusion that MHS needs a truncated and tightened overall statement of purpose whose semantics flow with the rest of the collection management policy. MHS also needs a statement of purpose for the collection management policy that verbally ties itself to the general statement of purpose and mission statement.

One of the most important pieces of a collections management policy is the mission statement. It is the one statement that the public is most familiar with, and the

---

one people read to grasp the overall meaning of an organization. Dearstyne explains the
mission statement needs to be concise, and it “is a definition of the repository-what the
repository is and what it does.” The current general MHS mission statement is five
sentences in length and gives an overall view of the society. I have determined that MHS
needs a more focused and shortened overall mission statement. The statement should
include why the organization formed, historical materials that are collected in order to
fulfill the mission, the individuals or organizations that they serve, and the organization’s
overall goal. The society also needs a mission statement for the collections management
policy that connects to the overall mission statement. From the mission statements other
policies flow.

An acquisition policy is a declaration of need. Laura A. Millar emphasizes that the
“acquisition policy defines the scope of acquisitions: what will the archival agency
acquire and what will it exclude from its holdings.” MHS has an acquisition policy that
institutes several general best practice points, but including specific items would clarify
for the staff and donors what is and is not accepted. Based on Millar’s information, I
conclude MHS needs to specifically state items that they will and will not accept in their
acquisition policy.

Having a well-rounded collection makes a historical agency a more reliable source.
Millar points out “rather than just collecting in areas of research strength, the institution

---

92 Ibid., 186.
93 Ibid.
94 Laura A. Millar, Archives: Principles and Practices (New York: Neal-Schuman
should collect materials that fill gaps or weaknesses in the institution’s holdings."\textsuperscript{95} I believe MHS should include in the acquisition policy their collection strengths and gaps in order to identify collection areas to strengthen.

Having a collection that is duplicated by other institutions wastes time and energy, and overcrowds already precious storage space. Millar advocates examining policies of other local historical agencies to prevent duplicate collections.\textsuperscript{96} Collaborative collecting is another essential element of a collection management policy, and would prevent collection duplication. At the moment, MHS does not have this type of policy. Because the Contra Costa Historical Society and the Martinez Library, both located in Martinez, can potentially collect the same items as the Martinez Museum, I concluded that MHS needs a collaborative collection policy.

The last element in the collection management policy is the deaccession policy. The “SAA Guidelines for Reappraisal and Deaccessioning” states an item can be removed when it is no longer congruent with the collection policy, or an item initially did not meet the needs of the collection policy.\textsuperscript{97} SAA guidelines strongly urge detailed documentation during reappraisal and deaccessioning for ethical and informative reasons. MHS currently has a deaccession policy, but I concluded that MHS needs a more detailed policy that defines the steps of the process.

\textsuperscript{95} Millar, \textit{Archives and Principles}, 119.
\textsuperscript{96} Ibid., 119.
The second part of the consultant’s report is a preservation management policy. Dearstyne states “use is the ultimate purpose of archival work.” An archive is meant to be used, and its collection should not be cloistered away from the public. That said, the collection must be maintained and preserved to ensure future use. A preservation management policy is a written document that addresses the vast scope of preserving historical items. Five issues to be addressed include temperature and humidity management, safeguarding from light, proper storage and handling, and an emergency plan. MHS does not have a written preservation policy. After my research I concluded MHS needs a written preservation management policy that addresses the previously mentioned issues to ensure their archival longevity. Millar explains “a preservation plan not only helps focus the archives’ energies and resources but can also help convince the institution’s sponsors-the resource allocators-that the archival operation is moving ahead in a deliberate and well-thought-out manner.” A written policy is proof that the collection will be effectively housed and handled.

An excellent source for practical preservation applications is Nelly Balloffet and Jenny Hilles’ book Preservation and Conservation for Libraries and Archives. They offer many valuable suggestions for smaller institutions such as MHS. For example, if an agency has wood shelves and is unable to change them completely to metal, then change

---

98 Dearstyne, Managing Historical Records, 135.
99 Millar, Archives and Principles, 87.
the actual shelf to metal. Or, if that suggestion is not feasible, then line the wood shelves with mylar to protect the books from wood off gassing.\textsuperscript{100}

Long-term temperature and humidity mismanagement along with mishandling of items can slowly erode a collection. Millar states “Temperature and humidity management and physical mishandling are considered by many to be the most destructive and so are top priorities for action.”\textsuperscript{101} Since these are both priorities they need to be addressed in the policy. A policy that includes tracking of the building’s temperature and humidity, washing hands before handling the collections, and wearing lint-free cotton gloves while handling the collections will help in long-term preservation.

Over time, the cumulative effects of light can harm a collection. Millar explains light “breaks down chemical bonds and causes ink to fade.”\textsuperscript{102} Light is also a source of heat, which can harm the collections.\textsuperscript{103} This is why MHS’s preservation management policy needs to addresses this issue, and offer ways to mitigate the effects such as light filters, and window shades and blinds. Archival containers also protect items from light damage.

Housing the collections in archival housing containers is an easy step to help preserve the collection. Archival containers “provide a stable microclimate, reducing the spread of acid and mitigating the effects of fluctuating temperature and relative

\textsuperscript{101} Millar, \textit{Archives and Principles}, 75.
\textsuperscript{102} Ibid., 80.
\textsuperscript{103} Ibid.
humidity.” After researching the necessity of appropriate archival containers, I concluded that MHS needs a policy that addresses the different types of archival storage containers for MHS’s various historical resources. Once items are in appropriate containers they need to be stored properly.

Adequate storage space is essential for collection safety and longevity. Christina Zamon points out in *The Lone Arranger*, adequate facility space is important to prevent storing items at several different sites, or in non-optimal situations. At the moment the museum stores archival materials in a fireproof vault, in the research room and in a shared offsite temperature and humidity controlled location. I concluded, a policy that addresses storage needs and ways to increase use of existing space are important.

The final focus of the preservation management policy is an emergency plan. It is vital that every institution has an emergency plan. MHS does not have a site-specific emergency plan. Therefore, MHS should develop a plan that contains three components: “comprehensiveness, simplicity, and flexibility.” They should identity natural disasters and emergencies common to the area, as well as in and around the institution. They should also cover short term and long-term goals and responses. The purpose of collection and preserving is for researchers to use the collections.

The third aspect of the consultant’s report focuses on researcher accessibility.

---

104 Ibid., 79.
Zamon advocates for the researcher to work within a designated non-communal area.\textsuperscript{108} Literature also states a researcher should have their own area to maintain their privacy. At the museum, researchers share an area with the volunteers in the resource room. I concluded an ideal way to provide researcher privacy is to incorporate a separate research room with each researcher having their own personal space. Simply having a designated researcher room is not enough.

The success of a research room depends on an adequate policy for researchers to follow. A policy gives the researcher a guideline for what is expected of them at the institution, and would increase the protection and longevity of MHS’s historical resources. SAA backs up this recommendation: “To protect and insure the continued accessibility of its holdings, repositories should require all patrons to use all research materials in accordance with published institutional policies.”\textsuperscript{109} Therefore, I conclude that MHS needs to develop policies for the researcher room.

Over time, the consultant’s report evolved tremendously. Researching archival best practices helped to mold the report into policy heavy document but with many practical applications. This is a tailored deliverable that MHS can implement now or at a future date. Archival best practices can be a daunting task for any facility to administer. Having a well developed and connected policies centered on collection

\textsuperscript{108} Zamon. \textit{The Lone Arranger}, 88.

management, preservation management, and researcher accessibility are manageable first steps to achieve this task.
APPENDIX A

CONSULTANT’S REPORT: PRESERVING AND USING HISTORICAL RESOURCES AT THE MARTINEZ HISTORICAL SOCIETY
Preserving and Using Historical Resources at the Martinez Historical Society

by Deborah Hebert Lee

Fall 2015

The Martinez Museum
Martinez, California

Courtesy of the Martinez Historical Society
Executive Summary

Through preserving, interpreting, and making accessible historical objects and documents pertaining to a community’s local past, historical societies provide the public with often unique and valuable historical connections and educational resources. They provide a sense of community that few other institutions can duplicate. Historical societies operate at the state, county, or city level, commonly with a volunteer staff, limited if any salaried staff, and a narrowly defined budget. Operating a historical society is multifaceted, challenging, and gratifying work. One of the many challenges historical societies face is the proper coordination and care of historical materials. Having well-articulated policies and procedures prevents these valuable resources from going unnoticed, becoming unusable, and eventually lost.

The Martinez Historical Society (MHS) and the Martinez Museum provide a treasured historical, educational, and personal connection between the local community and their history. They serve long-term residents, new arrivals, and researchers, providing them with access to documents, artifacts, photographic materials, family papers, maps, and oral histories that help capture the historical essence of the community. The Society also sponsors an annual historic home tour, tours of downtown historic Martinez, and museum tours for local third graders. The Society is very much embedded into the local community.

This report is tailored specifically to the needs of the Martinez Historical Society and museum and seeks to identify current archival best practices that will serve as a foundation for maintaining, preserving, and making available the MHS collections for
researchers and the public. Recommendations are based on a literature review of current best practices and on recommendations drawn from the American Association of State and Local History (AASLH), Society of American Archivists (SAA), the Historical Society of Pennsylvania online guide for small repositories, and other relevant literature. Applying current best practices will enable MSH to use its resources to maximum benefit.

There are five key recommendations, which encompass the many nuances of collections management policy, preservation management policy, and researcher accessibility:

- First, develop a collections management policy that includes a statement of purpose, a mission statement, an acquisition policy, a collaborative collecting policy, and a deaccession policy that connect to the overall mission statement.

- Second, develop a preservation management policy that addresses proper temperature and humidity management, suitable storage and shelving, safeguarding from light, careful handling and preservation techniques, and an emergency plan.

- Third, turn the County Room into a separate researcher room with tables, chairs and computer access to the Past Perfect Museum database.

- Fourth, create a researcher room policy that includes rules and regulations of the research room, hours of operation, security measures, and an explanation of copyright and fair use.
• Fifth hire an academically trained archivist to ensure that MHS is protecting and managing their historical records to their fullest potential.

Archival Best Practices

I. Introduction

In *Managing Historical Records Programs: A Guide for Historical Agencies* by Bruce W. Dearstyne states “Historical agencies need to develop strategies to find resources to handle the dynamic nature of their work: more accessions, more visitors, more programs—all hallmarks of dynamic programs.” The goal of this project it to evaluate historical resources at the museum, and assess the facilities in order to identify appropriate archival best practices and recommendations that are useful and feasible for the MHS to implement either now or at a future date. Managing a historical society and museum is a meaningful endeavor that demands a high level of attention, resourcefulness, and time. Tailored recommendations are strategies that can benefit the society and those they serve now and in the future.

II. History of the MHS

On November 29, 1973, the Martinez Historical Society officially organized at City Hall in Martinez, California. As stated in the meeting minutes, the initial aim focused on forming the society, with the subsequent goals of preserving the Borland Home from destruction and the designating it as a museum. The museum dedication occurred in
conjunction with the Martinez bicentennial celebration on June 6, 1976. With the eventual accomplishment of all three of these goals, the museum partially opened up to the public in 1976, and opened the remainder of the museum in 1979. The Articles of Incorporation were certified by the State of California in 1975. The articles were amended in 1982 to state “the corporation shall not carry on any other activities not permitted to be carried on by a corporation exempt from Federal Income taxation under Section 501 (c) (3) of the Internal Revenue Code of 1954.” The articles contain the bylaws, which have been revised in 2000, 2004, 2012, and 2013.

The Borland Home, located at 1005 Escobar Street in downtown Martinez, is an 1890 two-story Stick/Eastlake style wood framed building. In the MHS publication The Borland Home: A History of the House and a Guide to the Museum states the home was constructed for Dr. John S. Moore and his family, with the initial purpose to serve both as a residence and a dental office. The building continued as a family home after its inheritance by Dr. Moore’s daughter Emma and her husband James Borland. After Mrs. Borland’s death, Mr. Borland then sold the home to his brother Robert and his wife, Margaret Borland. After Robert Borland’s death the home saw new life as a boarding home, and then became the property of the Contra Costa School Board in 1948. The school board used the building until 1973, when they began to lease the building to the MHS. The Borland Home received placement on the National Register of Historic Places on April 2, 2015.
III. Existing Facilities: The Borland House

The museum consists of two floors. The first floor contains four public rooms, a large vault, bathroom, and a small kitchen. The Front Room is the original parlor, and now contains framed photographs of former Martinez residents and descendants, a wood replica of the transpacific lumber schooner the *Forester* (whose remains can be seen today along the Martinez shoreline), antique postcards, and other small items related to Martinez in two separate display cases. The Dining Room contains a small display case, map drawers, an antique dining table, and several framed photographs of early Martinez residents, including those of Martinez’s earliest families. One of the artifacts is a baseball signed by Joe DiMaggio, a brief native of Martinez. The County Room, the original dental office, contains items related to the history of Contra Costa County. Items include the bell from the 1854 Courthouse, a painting of the 1901 Court House, pictures of former Contra Costa County sheriffs and judges, Miwok Indian prints, a display on the Port of Chicago Disaster, an 1827 pump organ, and a Miwok Indian display from the 1915 Panama-Pacific International Exhibit. All the windows on the first floor, except those in the resource room, have a shade that partially covers the window with a long sheer curtain. Towards the back of the house is the Resource Room.

The Resource Room, sometimes referred to as the library, is the central gathering area for volunteers to work on tasks. A large wood desk with wood chairs serves as a workstation. A computer is located at a separate computer desk in this room. Two sides of the room are lined with wood bookcases that contain various sources: cemetery and death records, a copy of the 1860 U.S. Census, telephone directories, Alhambra High
School yearbooks, scrap books, history videos, family histories, Shell Oil refinery newsletters, Martinez Historical Society Newsletters, and microfilm of the Gazette newspaper. The room has two windows, with blinds. There is overhead fluorescent lighting. There are some boxes of materials on the floor. This room is not original to the house. Next is the storage area.

The Vault is a cement block lined room with a lockable metal door. Wood shelves line the walls. There is approximately six inches from the floor to the bottom row of boxes. There is one moveable metal shelf, and several metal filing cabinets in the middle of the room. Boxes of materials sit directly on the floor. There are no windows in the vault, and the room is illuminated by florescent light. This area is not original to the house. The second floor contains four rooms.

The first room on the second floor is the Waterfront Room. It has information and items related to fishing, the Carquinez Bridge, the 1930 Southern Pacific Railroad Bridge, and the Forester ship. There is a display on the Martinez-Benicia Ferry that operated from 1847 to 1962. A small barbershop has been recreated in a small room off the main hallway. This room originally functioned as a bathroom sometime during the twentieth century, and is not original to the house. Next is the School Room.

The School Room, as the name implies, contains items from local schools. There are several old photographs of the local football and baseball teams. There is a display case containing a photograph of Joe DiMaggio and a copy of his birth certificate. In the same case are photos of other former Martinez residents, including Simon Rodia, John Muir, and John Swett. The Olden Days room houses ephemera related to Martinez’s past,
including advertising, early technology, police badges, fire alarms, and kitchen items.

Present or former Martinez residents have donated most of the artifacts in the museum.

The rooms maintain the overall mission of the museum, which centers on collecting, preserving, and exhibiting items related to Martinez history. The windows throughout the second floor have shades that partially cover the windows with a long sheer curtain.
-Figure 1. A portion of the 1891 Sanborn Map of Martinez, CA. -

The Borland Home, now the Martinez Museum, is circled in red.
- Figure 2. First floor diagram of the Martinez Museum -
- Figure 3. Second floor diagram of the Martinez Museum -
**IV. Museum Holdings and Database Software**

The museum has a wide variety of historical items. In addition to the items on display, the holdings include approximately 2,000 photographs, several binders of negatives, 600 DVDs, 150 maps, eleven cubic feet of documents, 308 boxes of artifacts, twenty-nine telephone directories ranging from 1905-1961, numerous Alhambra High School yearbooks ranging from 1909-2010, microfilmed newspapers, periodicals, and maps ranging from 1860-1990. Archival grade acid-free boxes, folders, and photo sleeves are currently being used to house the collection.

Inventories of historical resources are indexed in five different ways. The first is a master index binder, which lists the items according to three categories: photographs, paper, and boxes. Items are further placed into subcategories. The boxes category identifies items by box number and gives a brief description. The second indexing system is two hand-written accession books that list every catalogued item. The third system is the half sheet binder, which details additional information not included in the accession book. The fourth system is Past Perfect Museum database, which contains their main central inventory of catalogued items. Inputting items into the database is an ongoing process, and does not include all historical resources. The fifth indexing system, are three boxes of 3x5 index cards that lists items according to subjects, significant history, and occasionally their location.
V. Organizational Structure, Membership, and Funding

The organizational structure, membership, and funding of MHS is typical of most small historical societies. Currently, there is a fifteen-member board of directors whose function is to develop museum protocols, allocate financial resources, oversee various committees, and govern the MHS. The board meets the first Tuesday of every month. The museum also has a museum director, a newsletter editor, and a web site master. The museum staff is composed of thirty-five volunteers including twenty volunteer docents. There is no paid staff. Funding is provided by community grants for specific projects. The Shell Oil Company, the City of Martinez, and the Community Foundation are among its donors.

VI. Security and Emergency Plan

Security is important at the museum. The museum currently has an alarm system and motion detectors. There are three smoke detectors, two fire extinguishers, and a fire alarm. The museum does not have an indoor sprinkler system. Non-emergency police phone number and the director’s phone numbers are currently posted by the telephone. The museum does not have an emergency plan at this time.

Policy, Preservation Management Policy, and Researcher Accessibility

The following is a three-tiered approach centered on collections management policy, preservation management policy, and researcher accessibility. Each tier includes a statement of principle from current literature, present MHS practice, and an appropriate recommendation. The combination of these three components will hopefully serve as a useful guide for MHS to maximize the use and longevity of their collections.

Collections Management Policy

In *Nearby History: Exploring the Past Around You* David E. Kyvig and Myron A. Marty note that “the first standard for judging any repository must be the strength of its commitment to preserving and making accessible its holdings.” Commitment can be defined as a tailored collections management policy, which includes a statement of purpose, a mission statement, an acquisition policy, a collaborative collecting policy, and a deaccession policy. These types of documents signal to the community and potential donors the institution’s specific purpose, collecting scope, and processes. Written policies give credence to the budget. MHS currently has several policies in place.

MHS currently has a written purpose, an overall mission statement, an acquisition policy, and a deaccession policy, but not an overarching collections management policy. The following is a proposal for an overall collections management policy:

- *It is recommended that MHS develop a collections management policy that encompasses a statement of purpose, a mission statement, an acquisition policy, a*
collaborative collecting policy, and a deaccession policy which connects itself to the overall mission statement. The collections management policy should be placed in the MHS’s policy and procedure manual and on the MHS website. A designated committee or individual should review the policy every three to five years to ensure the policies are current and compatible with the society’s mission. Changes to the policy should be approved by the board to insure the policy’s authority.

In Managing Historical Records Programs: A Guide for Historical Agencies Bruce Dearstyn explains, a program needs a statement of purpose to delineate its authority, and to connect itself to the overall agency. A statement of purpose can also be referred to as a mandate. MHS has a defined purpose stated in the Articles of Incorporation dated April 14, 1975, and in the MHS bylaws ratified last on May 24, 2013. Both documents clearly articulate the purpose of the MHS: “The specific and primary purposes are to promote, initiate, sponsor and carry out plans, policies and activities for the discovery, preservation and dissemination of knowledge about the history of the City of Martinez and its surrounding areas.” Both policies proceed to list their objectives.

The following is a proposal for a statement of purpose:

- It is recommended that MHS create a separate abbreviated statement of purpose for the overall society and the collections management policy.
- A suggested overall statement of purpose for MHS: The purpose of the MHS is to collect, preserve and share the tangible heritage and historic memory of
Martinez, California through stewardship of its collections, museum exhibits, and library.

- A suggested collections management policy statement of purpose: The purpose of MHS collections management policy is to ensure the continuity of Martinez’s historical memory through the collection and sharing of its historical resources.

A clearly articulated mission statement is vital because it is the foundation from which all other archival policies flow, and explains the essence of an institution. Dearstyne explains a mission statement concisely defines the institution’s existence, collections, and audience. The author further explains the mission statement for a records management program, in this case the collections management policy, should be separate from the overall institution. An example of a historical institution that maintains two separate mission statements is the Center for Sacramento History. The statements are located under policies and procedures and in the collection management pdf located on the same page: (http://www.cityofsacramento.org/Convention-Cultural-Services/CSH/about/policies-and-procedures). Implementation of the first MHS mission statement occurred in 2004, with the last update in 2015. The following is the overall MHS mission statement:

1. **TO COLLECT** items relating to the history of Martinez and the surrounding area and to deposit them in locations that are convenient for both researchers and the general public.

2. **TO PRESERVE** the history of Martinez and to preserve physical objects related to that history.
3. TO STUDY AND DISCOVER new information about the history of Martinez.

4. TO EDUCATE the community about Martinez history. To arouse interest in the study of history. To promote an appreciation in the community that the past determines the present era-and that through the study of our history we can plan for a better future.

5. TO DISPLAY the Society’s collection for the benefit of the public.

MHS’s mission statement, a page-long document with five main points, is followed with seven points explaining how the mission is accomplished. The first five statements presents a good overall picture of what MHS does. A more detailed mission statement would give the mission a specific focus. The statement should include why the organization formed, historical materials that are collected in order to fulfill the mission, the individuals or organizations that they serve, the organizations overall goal, and should be tailored to one to three sentences which concisely defines the MHS. This section describes how the mission is accomplished, and names researchers, the general population, and teachers as collection users. Third graders also tour the museum, so students should be specifically named in the collection policy. This section also mentions genealogies in the library; likewise genealogists should be mentioned in the collection policy.

The following is a suggestion for an overall mission statement, followed by a mission statement for a collections management policy:

- The Martinez Historical Society is a non-profit historical organization founded in 1973 in order to preserve the 1890 Victorian era Borland House as a local
history museum. The mission of the MHS is to collect, preserve, interpret, and make accessible documents, photographic materials, ephemera, and artifacts pertaining to Martinez history from pre-founding of the city to the present. The purpose of MHS is to encourage historical critical thinking by the community, researchers, genealogists, and students through the use of its archives, library, research room, and museum displays.

- The mission of the MHS collections management policy is to provide a framework for the collection, preservation, and accessibility of its documents, photographic materials, ephemera, and artifacts pertaining to Martinez history for use by the community, researchers, genealogists, and students.

The second part of the current MHS mission statement document describes how the mission is accomplished. Detailing how the mission is accomplished aids in procedural transparency and potentially encourages donors. The Society of American Archivists (SAA) “Standards and Best Practices Resource Guide” lists several institutions’ policies and procedures that adhere to SAA’s best practices. One of the examples listed in SAA’s best practices is the John F. Kennedy Presidential Library and Museum’s Collecting Policy and Procedures. Within this policy is their mission statement, which includes how the mission is attained: “We accomplish our mission by: preserving and making accessible the records of President Kennedy and his times; promoting open discourse on critical issues of our own time; and educating and encouraging citizens to contribute,
through public and community service, to shaping our nation's future.” The document describes broad avenues that culminate into an overall goal.

The following is the MHS document that explains how they accomplish their mission:

- **STORAGE FACILITIES** – To provide space to collect, conserve & safeguard historical materials. To provide fireproof storage space for the most valuable and irreplaceable documents, photographs and other materials. To provide sufficient storage space to enable researchers to comfortably work with materials -- and to minimize the culling, de-accession & dispersal of materials. To catalog materials to facilitate retrieval from storage when needed.

- **LIBRARY FACILITIES** – To provide shelf space for histories, genealogies, biographies, newspapers, pamphlets, circulars, programs, posters, photographs, manuscripts, letters, diaries, journals, maps, surveys, field books, oral histories and public documents in both print (paper) and other media. To provide off-site backup of materials in digital format.

- **RESEARCH MATERIALS** -- To purchase materials of value to researchers. To create an environment which encourages donations of materials. To provide access to, and copies of, materials to all researchers. To assist the public to find the information that fits their needs and to deliver that information to them. To provide these services in a helpful and welcoming environment. To promote the discovery of new historical information about Martinez.
• **MUSEUM FACILITIES** – To provide public display space to exhibit pictures, photographs, paintings, relics, and other historical artifacts in clean, safe, well-lit and attractive locations.

• **EDUCATIONAL PROGRAMS** – To host tours of our facilities. To set-up educational exhibits in our own facilities and elsewhere. To host or support tours of the community’s historic homes, businesses, and historic locations. To publish, and to support publication efforts by others. To provide press releases. To support initiatives by newspapers and magazines to publish Historical Society materials. To create videos, and to support their creation by others. To provide material for radio and TV programming. To maintain a website and post historical information on the Internet. To provide lectures & slide shows to the community, or to support others who wish to do so. To assist teachers in developing classroom materials.

• **HISTORIC PRESERVATION** – To identify and place plaques on historic buildings. To prepare or support the creation of historic structure inventories. To support property owners who wish to preserve, convert and continue the use of the historic buildings in Martinez.

• **COLLABORATIVE EFFORTS** -- To work with other historical societies to maximize the preservation of historical materials and to deposit the materials in the appropriate location for researchers and the general public. To co-operate with local government, community service organizations, arts groups and other
appropriate organizations to accomplish more of the Historical Society’s objectives than would be possible by working alone.

Describing how the mission is achieved should be condensed to a few broad and informative sentences to capture the reader’s interest. The following is a suggestion describing how the mission is accomplished:

- The MHS accomplishes the mission by collecting, cataloging, storing, and displaying historically significant materials related to Martinez; MHS encourages the use of its materials by the public, researchers, students, educational institutions, and print and broadcast media via the onsite library, museum, and online website; MHS advocates historic mindfulness in the community by encouraging historic preservation, history-related publications, and collaborative communication with the regional government and local organizations.

Once a succinct overall mission statement is in place, a collections management policy’s statement of purpose and mission statement, an acquisition policy, a collaborative collecting policy, and a deaccession policy should follow. An acquisition policy serves as a guide for acquiring relevant historical items related to the organization’s mission. In Archives: Principles and Practices Laura A. Millar states the acquisition policy should clarify items the agency will welcome and decline. A written policy establishes validity to what is or is not accepted. Millar recommends acquiring materials that bolsters collection gaps.
The current MHS museum collection acquisition policy has six main points, and is dated August 9, 1994. The current acquisition policy states:

1. *Acquisition of material for the museum collection by gift should be consistent with the Museum Purposes and Goals. Material should be of local or regional significance and usable for exhibit or educational purposes.*

2. *An active and ongoing program for acquisition of such material should be carried out by Museum staff.*

3. *Before materials are acquired, consideration should be given to the Museum’s ability to care for, store and use the material.*

4. *Acquisition of material should comply with all legal restrictions associated with the material source, ownership, copyrights, etc.*

5. *Title to material, authenticity, history and any restrictions as to its use of material should be avoided unless those restrictions are acceptable to the Director.*

6. *The acquisition procedure will include:*  
   - Acceptance by the Director who will have the option of returning the object or material to the donor if, in the absence of the Director, the object or materials has been conditionally accepted by another member of the Museum staff.
   - *A systematic and complete record keeping system.*
   - Monthly reports to the Museum Board on acquisition.
   - *A signed Gift Agreement should be completed upon acquisition of any donated material.*
The current MHS acquisition and deaccession policy, has several general best practices: it broadly aligns the policy with the museum’s goals and purposes, states materials are actively sought, refers to proper storage of new acquisition, discusses copyright and ownership, and gives a broad acquisition procedure. Unless the reader had the mission statement at hand, however, this first point could make the reader unclear of its intended meaning. By having an over arching collections management policy, the purpose and mission would be clearly visible to a reader. The geographic collecting area needs to be more clearly defined in order to have a specifically demarcated region of collection. The policy does not specify what items are collected and which are not collected, and it is important for the public and the MHS staff to know what to collect and what not to collect. This also saves valuable space for items that truly fulfill the mission. The policy does not mention collection strengths and gaps.

The following are suggestions for the acquisition policy, which is within the collection management policy:

- *It is recommended that the acquisition policy state specifically that the museum will only accept items if it helps to fulfill the museum’s mission. If the occasion arises that MHS needs to turn away a specific donation because it is unrelated to the museum’s collection management policy, the policy provides written proof for the refusal.*

- *Describe the specific geographic boundaries form which the museum collects items. For example, MHS will only collect items that are related to the area within Martinez’s city limits.*
• Indicate in the acquisition policy specific types of items that will be collected such as maps, photographs, and diaries etc. Also state items the society does not collect. For example, MHS collects maps, photographs, artifacts, documents, diaries, and ephemera related to the city of Martinez and its residents. MHS does not collect, maps, photographs, artifacts, documents, diaries and ephemera of another city or country.

• Explain in the acquisition policy how MHS acquires new materials. For example, MHS collects items through donations only, and does not purchase items for the collection.

• List the collection strengths within the acquisition policy. For example, MHS’s collection strengths include the recently acquired Perryman Native American collection and the Alhambra High School yearbooks.

• List the collection gaps in the acquisition policy. For example, MHS needs Martinez newspapers from 1940s-1950s.

Dearstyn recommends cooperative collecting, which partitions collecting responsibilities among local historical agencies. If MHS had a written cooperative collecting policy, they could potentially prevent the duplication of holdings among local institutions. The author suggests the establishment of a committee to ensure enactment, cooperation, and organizational support.

MHS already actively collaborates with other historical agencies and groups including the Contra Costa Historical Society (CCCHS), the National Parks Service, the
East Bay Regional System, and the Conference of California Historical Societies (CCHS). This collaboration serves as an opportunity to discuss challenges and new approaches related to their individual institutions. MHS does not currently have a collaborative collecting policy. The subsequent suggestion is for a collaborative collection plan:

- It is recommended that MHS contact the Contra Costa County Historical Society, Martinez Library, and other geographically local historical agencies to develop a collaborative and coordinated plan to divide collecting responsibilities. Include collaborative collecting within the MHS collection management policy.

Reappraisal and deaccessioning, accompanied with clear policies and thorough documentation, are an essential part of a successful collection management policy. At times, the reexamination and potential removal of an item from a collection is suitable. There are numerous reasons why an item should not be maintained within the collection. The “SAA Guidelines for Reappraisal and Deaccessioning” points an item can be removed when it is no longer congruent with the collection policy, or an item initially did not meet the needs of the collection policy. SAA explains “reappraising and deaccessioning collections for the primary purposes of generating operating income; satisfying personal interests, aversions, or prejudices; and pleasing donors or resource allocators are not consistent actions with best practices or the SAA Code of Ethics.” Proper documentation is vital to ensure transparency for everyone involved. SAA
guidelines strongly urge detailed documentation during reappraisal and deaccessioning for ethical and informative reasons.

Once an item is slated for deaccession, every effort should be made to find the item a proper home. There are several options once the item is removed from the collection. The item can be donated to an institution with a more suitable collecting scope. The item can be donated to a school or library. Or if MHS is unable to properly store an item, such as a nitrate film, donation to an institution that can properly care for the item is acceptable. Selling an item can be a delicate issue that requires openness between the donors, the museum personnel implementing the deaccession, the museum board, and the new recipient. SAA recommends having policies that list the procedure for selling an item and to “describe under what conditions a sale should be considered and how the proceeds will be spent, such as purchasing new acquisitions, processing, digitization, reference, preservation and conservation of remaining collections, or even reappraising and deaccessioning more collections.” SAA notes that donors and the public can be unhappy with items being sold, so proceed with caution.

The MHS museum collection deaccession policy and procedure has five components, and implements solid archival points. The first component states:

1. Material may be deaccessioned from the collections when the following conditions are met: there are no legal restrictions to the contrary, the material is no longer relevant or useful to the Museum, the material is of historical value to some other institution, and the Museum cannot properly care for the material.
The deaccession policy was last updated on August 9, 1994. MHS currently uses the Past Perfect Museum database, which creates a deaccession file for the deaccessioned item. Stating that items will only be deaccessioned if there are no legal restrictions, or if of historical value to another institution, is part of archival best practices. The rest of the statement needs more detail in order to enhance clarification.

The following are suggestions for the first part of the deaccession policy, which would be found within an overall collections management policy:

- It is recommended that the policy should include specific reasons for deaccessioning that follow the SAA standard. For example, instead of stating “The material is no longer relevant to the museum,” it might state: An item may be deaccessioned when it no longer fulfills the MHS mission, or does not fall within the geographic collecting scope.

- Other suggestions: An item may be deaccessioned if it is decided by the MHS board to have more historical significance for another institution, if MHS already has a similar item, or if it is a duplication of an item already present in the collection.

- An item may be deaccessioned if the item is a potential hazard to the staff, visitors, or the rest of the collection. An item may be deaccessioned if it needs excessive conservation measures. MHS will make every effort to donate such an item to a repository that could give the item the needed attention.

The remainder of the MHS Deaccession policy states:
2. When necessary, an appraisal of the objects will be obtained; for instance, if space or need no longer exists and sale is considered.

3. A signature of our Gift Agreement allows the Historical Society to display, care for, sell, trade or dispose of an article without restriction; and, further, no return of the article to the donor or his or her heirs.

4. The deaccession procedure will include record-keeping requirements compatible with the acquisition procedure.

5. Procedure for deaccessioning will be presented to the Museum Board.

   A. Recommendations for the deaccession will be presented to the Board by the Director. Those recommendations will include: a list of materials, reason for deaccession, method of deaccessioning, an appraised value if necessary.

   B. The Museum Board will take action on the recommendation.

Again, there are several sold archival points within this policy. Although, MHS does not have a policy that dictates the procedure for selling a deaccessioned item nor how the funds will be used. The following suggestions are for the procedural portion of a deaccession policy:

- To increase transparency, list specific deaccession procedures to follow in the policy. For example: documentation of detailed explanation for why an item is considered for deaccessioning; suggestion placed before the board for deaccessioning of an item; document board approval or disapproval and reasoning; document steps that were taken to find a proper institution to take the
item; document steps that were taken to inform the donor; document final disposition of item; if item was sold, document the amount and allocation of proceeds along with receipts.

- Create and implement a policy that lists the reasons for selling an item, and explain how the proceeds will be used. For example: An item may be sold if a suitable repository has not been found after two to three documented attempts have been made, or if the item was originally purchased. Proceeds from a deaccessioned item may only be used for the preservation of the remaining collections: purchasing archival grade folders, boxes, containers or tissue paper.

**Preservation Management Policy**

Preservation of historical records is crucial to their future use, and a preservation management policy establishes the guidelines to reach this goal. Dearstyne states “use is the ultimate purpose of archival work.” In order for materials to be suitable for long-term use they must be properly handled and stored today. A preservation management policy is a written document that addresses the vast scope of preserving historical items.

Millar explains a preservation policy clearly articulates the preservation standards to the agency staff, governing board and donors. Again, Dearstyne states that a mission statement is needed within the plan, and should tie into the society’s overarching mission plan. At present, MHS does not have a preservation management policy. The subsequent suggestions are for a preservation management policy:
• Create a mission statement for the preservation policy. An example mission statement: The mission of the MHS preservation management policy is to preserve documents, photographic materials, ephemera, and artifacts pertaining to Martinez history in an environmentally appropriate setting by implementing current archival best practices.

• Develop a preservation management policy that guides the staff in implementing and maintaining temperature and humidity management, suitable storage and shelving, safeguarding from light, careful handling and preservation techniques for items within the collection, and an emergency plan. Include in the policy that there will be no eating or drinking near materials.

Temperature and Humidity Management

Temperature and humidity management is an essential element of a preservation policy. Millar asserts it is one of the most important aspects of maintaining the collections longevity because constant changes in temperature and humidity causes material to expand and contract making them structurally weak. There are varying standards for temperature and humidity management for different materials. In general, Millar adds, the climate should be between 18 to 20 degrees C with humidity between 35% to 40%, and not above 50%. The museum is currently heated with a furnace and uses fans to keep a cool environment. In general, Martinez enjoys a temperate climate. The museum is located less than a mile from the Carquinez Strait to the north and the Alhambra Creek, less than a mile to the west.
There are variety of ways to monitor the temperature and humidity: hygrothermographs, data loggers, or temperature and humidity cards. A hygrothermograph constantly records the temperature and humidity on a paper graph, uses batteries, need frequent calibration, with a starting price of $800. Data logger readings can be viewed remotely, is battery operated, and range from $100- $1000. The cards are the least inexpensive option and are usable for a year. If the card becomes wet, dispose of the card and install a new one.

The following are recommendations for temperature and humidity management at the museum:

- *It is recommended that MHS continually evaluate the temperature and humidity in the museum in order to assess the environmental conditions. Place the monitoring devices in the vault, library, and near the exhibits in high and low areas. Keep a record of the findings.*

- In *Preservation and Conservation for Libraries and Archives* Nelly Balloffet and Jenny Hille recommend recording temperature and humidity twice a day at the same time of the day and night for a year. *Keep a record of the findings. Assess the results and present the findings to the board.*

- *If MHS contemplates an addition or renovation, consider installation of an HVAC system in order to maintain steady temperature and humidity levels to increase the longevity of the collections.*
Storage

Sufficient storage space is needed to ensure proper containment and accessibility of current and future acquisitions. It is always a good idea to have extra space set aside for future acquisitions. Christina Zamon points out in The Lone Arranger, adequate facility space is important to prevent storing items at several different sites, or in non-optimal situations. At the moment the museum stores archival material in a fireproof vault, in the research room, and a shared offsite temperature and humidity controlled location in Richmond, CA. The subsequent suggestions would increase storage space for the museum:

- **In order to increase storage space in the museum, consider turning the research room into a room dedicated to storage of archival materials. Discussion of a new research room can be found in the Researcher Accessibility section.**

- **Consider installing collapsible metal shelving in the vault and in the current research room in order to use the free space between the shelves, and increase overall storage capacity of both rooms. Have a professional engineer assess the weight bearing extent of these two rooms to determine if such shelving can be used.**

Shelving

Proper shelving allows the housing of a collection in a well-organized and easily accessible manner, and is an important element in increasing the longevity of a collection. Balloffet and Hille advocate shelving made of powder-coated steel, anodized aluminum, or chrome-plated steel. Because of its innate properties, metal shelving is not
harmful to archival materials. Wood shelving, which is currently being used at the museum, can harm items because of gas emissions from the wood. The gases undermine the structural integrity of archival materials. Millar recommends archival shelving to be “sixteen inches deep by forty two inches wide because it can accommodate a variety of the most common type of boxes.” There should be approximately six inches between the bottom shelf and the floor for proper ventilation and the event of a water hazard. Materials should never be stored on the floor. This is not only a tripping hazard, but materials could inadvertently be damaged if there is a water leak.

At the moment, the MHS library has wood shelving above wood cabinets, and the cabinets extend to the floor. In the vault, wood shelving units are used and are in close proximity to the floor with some boxes being stored on the floor. There are some boxes stored on the library floor. The following are recommendations for improving museum shelving:

- **It is recommended that MHS replace the wood shelving in the vault and the library with metal shelving, and have a six-inch clearance between the floor and the first shelf.**

- **Ballofett and Halle suggest that if an organization has wood bookcases, and is unable to change to a metal shelving unit, it is recommended the individual wood shelves should be changed to metal shelves.**

- **Another suggestion by Ballofett and Halle is to line the wood shelves with mylar or other polyester film in order to protect materials. Millar advises the use of,**
“Mylar, which is a clear, uncoated polyester film, is considered the most stable plastic container for archival materials.”

Safeguarding from Light

All materials need to be protected from UV light. Millar notes light exposure causes fading, oxidation, and heat. The author further notes light levels should be between 50 to 100 lux. A good way to track light levels is to use a light meter. The cost of a light meter can range from $270 to $1,000. If unable to purchase a meter, in Archives for the Lay Person: A Guide to Managing Cultural Collections Lois Hamill suggests borrowing a meter from an art museum.

Currently, the museum uses fluorescent lighting with UV filters over lights used in the exhibits. There are blinds in the library windows, and sheer curtains and partial shades in other windows. Archival materials are kept in acid-free boxes. The following are recommendations for safeguarding the collection from the light at the museum:

- *It is recommended that MHS continue to store archival materials in acid-free boxes in order to decrease light exposure.*

- *It is recommended that MHS place UV filters over the remaining fluorescent lights. Full drapes, shades or UV filters should be used over windows to prevent direct sunlight damaging the collection. UV film ranges from $72 to $180 depending on size of the sheet or roll.*
• Balloffet and Hille recommend using paints and ceiling tiles that contain titanium dioxide, which absorbs UV radiation. Both should occasionally be wiped clean, while another coat of paint may be needed when it loses its luster.

• In order to lessen light damage, it is recommended that the exhibits are frequently rotated or use reproductions in the displays. Also, do not allow the exhibits to be exposed to direct light.

Archival Containers

Acid-free archival boxes, folders, envelopes and other items should be used to further enhance the longevity of the collections. Millar states that “archival quality envelopes, folders and boxes provide a stable microclimate, reducing the spread of acid and mitigating the effects of fluctuating temperature and relative humidity.” Good sources of archival grade materials are Gaylord, Light Impressions, or Hollinger.

MHS uses archival grade boxes, folders and envelopes. Once the proper container is determined, storage within the container should be assessed. The following are suggestions for the storage and careful handling of items within archival containers.

• Archival boxes should not be overfilled with materials because of the potential to harm the materials when retrieving them from the box.

• If a box is under filled, care should be taken to fill up the empty space to prevent materials from moving around, which can bend or damage them.

• Store liked-sized items together to prevent shifting.
• Consider encapsulation of maps and delicate documents or your most important or frequently used documents.

• Make a master copy of delicate, structurally fragile, or particularly valuable documents in order to preserve the originals from effects of use.

• Documents should be stored in a vertical position in acid-free folders. All metal staples and paper clips should be removed to prevent metal corrosion.

Photographs

Photographs are valuable sources of historical information. Proper storage, temperature and humidity management, and careful handling are needed to enhance their longevity. Millar states optimal storage for photographs is in a dark environment, and housed in “acid-free, non-buffered envelopes or folders, non-buffered photographic mats, mylar sleeves or inert plastic holders.” Millar further states photographic storage needs to be less than 20 degrees C, and humidity levels are slightly different: 30 to 35% for black and white and 25 to 30% for color. When handling photographs, Hamil recommends “use both hands to hold parallel sides of a photograph or place one hand underneath and hold an edge with the other to prevent bending, tearing, or breaking.”

The majority of the photographs at the MHS museum are black-and-white photographs. They are currently being scanned at 400-800 dpi, and are stored in acid-free folders and boxes. The following are suggestions for the storage and handling of photographs:
• When photographs are on exhibit, the light level should be maintained at 50 lux or below.

• Continue to store photographs in Mylar sleeves with in acid-free, non-buffered envelopes or folders.

• Photographs should be stored in a light-free environment with minimal changes in temperature and humidity.

• To insure the careful handing of photographs, always use lint-free cotton gloves when handling photographic materials to prevent the transmission of oils and dirt from human hands. Make sure to work on a clean surface.

Negatives

Photographic negatives are susceptible to the same negative effects as other archival material, therefore proper storage, temperature and humidity management, and careful handling is needed. Millar explains, the storage environment should be is less than 20 degrees C with 30 to 35% humidity, and housed in archival appropriate containers. Be aware of negatives that emit a vinegar smell, and separate these from the other negatives and store in an appropriate environment. The National Film Preservation Society states a vinegar smell is due to breakdown of the negative’s innate properties, and is exacerbated from storage in a non-climate controlled environment. Be aware of negative nitrates, which are extremely flammable, and could cause damage to other items in the collection. According to Millar, physical identification of nitrate negatives includes: “the term nitrate on the negative edge, the edges curl, the negative looks thick, stickiness, a brown color,
or a distasteful odor.” Metadata is an important way to attach information such as photographer and copyright to a particular image.

MHS stores negatives in archival sleeves, folders and boxes. The following is a list of recommendations for negatives:

- Negatives should be stored in areas with little light exposure and with minimal changes in temperature and humidity.
- To insure careful handling of negatives, lint-free cotton gloves should always be worn while handing negatives and they should be held by the edges only.
- A TIFF and a JPEG should be made of negatives and photographs. The JPEG is for making future copies, and the TIFF is for preservation.
- Consider making a copy of frequently requested negatives and photographs for researcher use in order to better preserve the original.
- Ensure that the appropriate metadata is being saved for each photographic image. Refer to pages 556-559 of the museum’s copy of Past Perfect Software for Museum Collections Version 5 User’s Guide for metadata instructions.
- Since MHS has a collection of negatives, it is very important to identify nitrate negatives.
- It is recommended that MHS does not attempt to house nitrate negatives at the museum or in any off site storage facility. Contact a facility that stores negative nitrates in order to make MHS a copy and then donate the original to the facility in order to ensure proper storage.
- Store negatives that emit a vinegar smell from the rest of the collection.
DVDs

DVDs store information on a disc. DVDs also need proper storage, temperature and humidity management, and proper handling. They should be stored vertically in archival grade boxes and inert plastic. Millar advises for them to be stored in an environment that is less than 18 degrees C and humidity between 40 to 45%. According to Hamill, adhesives, pens, and markers should not be used on the DVD surface; keep DVDs away from all heat sources and “three inches from magnetic fields.”

MHS has numerous oral histories saved on DVDs, and are stored in plastic containers, paper sleeves, and archival grade boxes. They currently have researcher copies of their DVDs. The following are suggestions for storage and proper handling of DVDs:

- *Continue to house DVDs in archival quality sleeves or containers, and store DVDs vertically.*
- *To insure proper handling, lint-free cotton gloves should be worn when handling DVDs.*

Artifacts

Artifacts are tangible pieces of history, which are often irreplaceable. Proper storage, temperature and humidity management, and careful handling techniques should always be used. Artifacts storage depends on the object’s dimensions, characteristics, composition, and fragility. Items should be stored in acid-free boxes, and often need to be wrapped in archival grade tissue to maintain structural integrity. Hamill states, “un-
buffered acid-free tissue is recommended when the item is of an unknown composition, wool, or silk; buffered acid-free tissue is recommended with linen and cotton.” The author further advises that “if there is fear of confusing the papers, use un-buffered acid-free tissue paper with all items.”

The museum has a variety of artifacts, ranging from an antique wedding dress to graduation tassels to Native American beads and tools. Items at the museum are currently stored in archival grade boxes. The following are suggestions for storing artifacts and garments:

- **When possible, store like sized artifacts together to prevent damage. For example, do not house a smaller artifact with a larger artifact.**
- **Textile boxes should be used for garments, with as few folds as possible, and place the tissue to pad potential pressure points.**
- **Always use archival grade acid-free tissue paper to wrap artifacts.**
- **To insure careful handling, wear lint-free cotton gloves when handling artifacts.**

**Books**

Books need the same care as other archival materials. Proper storage, temperature and humidity management, and careful handling will extend their use. Books are typically composed of paper, and have a high acid content. Millar advises that books should receive very little light, and stored between 18 to 20 degrees C with humidity between 45 to 50%. Books should be stored flat, vertically, or on their spine. Try to store similar sizes together to prevent shifting and damage. Millar advises not to mend books with
MHS has a large collection of yearbooks, phone directories, assessment books, and other bound items. Most books are stored on shelves in the vault and in the library. The majority are shelved vertically with some stored flat. The subsequent suggestions are related to the careful handling and proper storage of books:

- Use foam book mounts while using the books to prevent undue pressure on the binding and to cushion the book.
- Use archival snake weights to prop open books.
- Consider using archival grade book trays, which stores the book vertically and allow easy viewing of the title and accessibility.
- To insure careful handling, wear lint-free cotton gloves when handling delicate books.

Newspapers

Newspapers are an excellent historical resource because they help to place an event within the context of time and place. Newspapers are inherently unstable due to their acidic nature, and typically should not be kept. They should be digitized, or copied, using acid-free bond paper. The newspaper should then be discarded. If a newspaper must be kept, Millar recommends storing them in a lightless environment less than 20 degrees C with humidity between 40 to 45 %.

MHS collects current newspaper articles pertaining to the city of Martinez, county news, and world events. The following are recommendations for handling newspapers:
• It is recommended that MHS ensures that the copied articles contain all pertinent reference information: name of newspaper, title of article, author, date, and page numbers.

• It is recommended that MHS copy newspaper articles using acid-free bond paper, and consider discarding the newspaper if not deemed valuable.

Microfilm

Microfilm, if treated correctly, has the potential for an extensive life. Proper storage, temperature and humidity management, and careful handling are required. Millar explains that microfilm should be stored in an environment with stable temperatures between 18 to 20 degrees C with 35% humidity. It is important to store microfilm in containers to prevent exposure to dust, light, and other pollutants. The Northeast Document Conservation center advises for storage “safe plastics, such as polyester, polyethylene, or polypropylene, but not polyvinylchloride (PVC) or vinyl, are acceptable. Microfilm reels should be individually boxed, with film held in the wound position by a preservation-quality paper tag secured with a string and button tie,” and final storage should be in a steel filing cabinet.

MHS has a sizable collection of microfilm. The following are recommendations for microfilm:

• Use lint-free cotton gloves when handling microfilm, and hold by the edges.

• Consider making copies of microfilm for general use instead of using the original.

• Store microfilm in archival grade boxes in a steel filing cabinet.
Emergency Plan

Having an adequate emergency plan can save time, money and valuable resources. The Northeast Document Preservation Center (NDEC) points out the plan should have three components “comprehensiveness, simplicity, and flexibility,” and should cover a wide berth of emergencies from a water leak to an earthquake, with short and long term strategies. The plan should contain contact information of emergency personnel and volunteers who are eager and qualified to help after a potentially hazardous situation has been contained and the museum is deemed safe to enter by appropriate personnel. The California Preservation Program maintains a website with current workshops, disaster assistance, and other related information. The NEDC website has an emergency planning document that is helpful in creating a plan.

MHS does not currently have an emergency plan. The following are suggestions for an emergency plan:

- Create a simple to read one page Emergency Plan that is clearly posted near the phone and exits.

- Consider membership in the Bay Area Mutual Aid Network (BAMAN), which hosts a two-day disaster preparedness seminar and a water salvage workshop.

- Keep a clearly marked container of supplies that can be used in the event of an incident or for cleanup after an event. (i.e. gloves, plastic tarps, scissors, duct tape)

- Identify and keep an easily accessible record of items of high importance in the policy and procedure book.
• Contact your local police and fire department to inform them of your museum’s collections and a floor plan of the building.

**Researcher Accessibility**

**Research Room, Museum Database Software, Internet Access, and Finding Aids**

The purpose of preserving historical records is for public use, and it is the responsibility of the archives to provide equal access to the records. Zamon specifically states that researchers should have an area of their own. Researchers have the right to keep their research private, and an excellent way to provide this privacy is to have a research room with each researcher having their own table. Additionally, as archives become more focused on public outreach, providing public space for research is seen as a positive asset to an archival program. It is also important to have basic reference materials such as a dictionary and encyclopedias readily available.

Currently, researchers at the museum share space with the volunteers in the library. The following are suggestions for a research room:

• *In order to enhance researcher privacy and comfort, it is recommended that MHS turn the County Room into a Research Room.*

• *Have at least two separate tables, which allows two researchers to work individually at the same time.*

• *Have a storage cubicle, coat rack, or locker for researchers to store their personal belongings.*
To ensure longevity of historical records, storage and preservation are of prime importance, but so is careful handling of the items by public users. SAA recommends “To protect and insure the continued accessibility of its holdings, repositories should require all patrons to use all research materials in accordance with published institutional policies.” Posted rules for a research room is a standard procedure, and gives the patron an idea of what is expected of them while conducting research.

At the moment, MHS does not have a research room policy. The following are suggestions for such a policy:

- It is recommended that MHS create a research room policy that lists the rules and regulations a researcher must follow. Post the policy visibly in the research room, and also have the researcher sign the policy. Suggestions for the policy include:
  - Research room hours are Monday and Wednesday from 10am -2pm.
  - Research room is by appointment only. In order to better serve your research needs, please contact the facility a week in advance to determine what materials you will need.
  - The researcher will sign the registration book, which states the date, their name, address, affiliation, purpose of visit, and if they are a student, a researcher, or teacher.
  - Eating, drinking or smoking is not allowed in the research room or the museum itself.
o The researcher will fill out a researcher card that states the materials needed.

(This will not only aid in keeping track of materials used but also serves as a
deterrent against theft.)

o The researcher can only have one box or folder at a time.

o Please keep all items in the order that you found them.

o Please do not mark, bend or tag items in any way.

o Please do not use pens in the research room. Only pencils and laptops are
allowed in the research room.

o Cell phone use is permitted, but please be courteous of other patrons. Take
personal phone calls outside.

o Personal items such as coats, umbrellas and bags are not allowed in the
research room. A secure locker, with key, will be provided for the researcher
to safely store personal belongings.

o The researcher is responsible for determining copyright of all materials.

o Photocopies of materials are permitted at 25 cents per copy. Patrons are
allowed to take photos with their cell phones or copy with their personal
scanners.

o The definition of fair use and the copyright law is posted in the research
room.

Knowing your audience and the most requested items in the collection are important
elements in providing superior service. This data can direct the staff in the order of
processing collections, tailoring seminars and lectures for certain groups, and even the
budgeting of money towards certain supplies and functions. Dearstyne recommends for data to be gleaned through a consultation with the researcher before and after his or her inquiry and through a questionnaire. A questionnaire is helpful because it would contain consistent questions while an inquiry can reveal inconsistent questions. Dearstyne states there are six avenues of measurement. The first is to determine the different groups employing the records. Second is determining the lines of communication between staff and the researcher. The third and fourth areas include the researcher’s ultimate goal and the topics of inquiry. The fifth and sixth areas consist of the requested records and their usefulness. Dearstyne suggests evaluating the latter on a scale from one to five, with one being not useful to five being extremely useful.

Currently, MHS tracks website traffic on Facebook, and has a guest registration book for visitors to the museum. The following are suggestions for target audience data collection:

- Collect data in the six areas mentioned above over an extended period of time. Display the information in an excel spreadsheet or in some other format that is easy to use and read. Tally the results quarterly in order to present to the board. With a target audience and materials identified, MHS can tailor activities, policies, and the budget to the appropriate areas.

Past Perfect museum database software is commonly used by numerous museums and historical societies. The software has several useful documentation features including accessions, cataloging, donations, research, and reports. The program allows for entry of
items using consistent nomenclature into an Objects catalog, a Photos catalog, an
Archives catalog, and a Library catalog. The system also enables an image to be attached
to the catalog record.

Currently, MHS uses this database to accession items. The following are general
recommendations for Past Perfect and computer use:

- *It is recommended that MHS continue to catalog photographs and other historical
  items into Past Perfect in order to maintain a comprehensive central inventory.*

- *Consider having a computer in the research room, which allows researchers to
  search the Past Perfect database for historical items only, Keep personal donor
  information private.*

Internet access to collections is vital for researchers and general browsers. As more
people become used to access collections in this manner, the more it will become a
general expectation. MHS currently has a website that allows viewers to read short
historical essays taken from the Martinez Historical Society Newsletter, historical
information on local families and organizations, the MHS mission statement, information
on museum, walking, and cemetery tours. One way for researchers to know if MHS has
useful historical information, and to increase the use of MHS records, is to make finding
aids available for the collections. According to Dearstyne finding aids should contain the
following: “title of the collection, preface, introduction, biographical sketch or agency
history, scope and contents, series descriptions, and box listing.” Dearstyne further
advises that language used by the *Library of Congress Subject Headings* is recommended
in developing finding aids. One historical society model to follow is the Historical Society of Pennsylvania. They currently have a project “Hidden Collections Initiative for Pennsylvania Small Archival Repositories,” which initially began for the five counties surrounding Philadelphia to “survey and assess their archival collections, and create summary finding aids to these collections.” These finding aids are then placed online to aid access. Their project has been successful, and they are planning to create a national model that can be applied to organizations throughout the country.

Currently, MHS does not have finding aids for its research materials. The following are recommendations for finding aids:

- *Delegate a person to start writing finding aids for the most used collections.*
- *Once a finding aid is completed it can be changed into a PDF form for Internet use, and can be submitted to the Online Archive of California (OAC).*

**Further Reading and Continuing Education**

Having archival reference material on hand in the museum can serve as a convenient resource for MHS volunteer staff. The following three books were useful in tailoring recommendations for the MHS consultant’s report, and are recommended by the Historical Society of Pennsylvania (HSP) for small archives. The recommendations can be found on the HSP website under their “Resources for Small Archives.” The books include *The Lone Arranger: Succeeding in a Small Repository* by Michelle Zamona, *Organizing Archival Records: A Practical Method of Arrangement and Description for Small Archives* Second Edition by David W. Carmichael, and Louis Hamill’s *Archives*
for the Lay Person: A Guide to Managing Cultural Collections. MHS should consider purchasing the books to have in the MHS library for the convenience of the MHS staff.

The Lone Arranger is ideal reading for an archivist, volunteer, or librarian working in a small archive. The author discusses how to develop and enforce policies related to collections, a research room, researchers, and other staff. Organizing Archival Records is a no-nonsense source for small repositories with little archival experience to help them arrange their historical records. The book contains useful exercises to practice archival techniques such as arrangement and description. Archives for the Lay Person is a more in-depth look at archival practice and organization, with chapters four and five discuss how to create Past Perfect catalog records. Chapters five and six discuss working with photographs. The appendix contains samples of researcher guidelines and registrations forms, loan agreements, and a processing checklist.

A fourth book is recommended, Managing Historical Records Programs: A Guide for Historical Agencies by Bruce W. Dearstyne. This book is extremely useful in organizing a comprehensive historical resources program. Many of the suggestions in this report are taken from this book. There are checklists at the end of each chapter to help begin or bolster an existing program.

Continuing education is available through a number of educational workshops. There are a vast number of organizations that present such workshops. For example, the American Association of State and Local History (AASLH) currently have an online workshop toward historical societies called “Basics of Archives.” MHS volunteers currently take part in continuing education events.
Staff Archivist

Ultimately, consider hiring a full-time academically trained archivist who is passionate about maintaining, preserving and sharing historical resources with the public. A trained archivist is more likely to keep up to date with the latest information in the field, and can help guide an organization to their fullest potential. SAA has developed a list of core values and a separate core of ethics for archivists. A few of the SAA values include ensuring equal access and use of historical records, accountability of government agencies and public individuals by having their records readily available, advocacy for their institution through the use of historical records, professionalism, and the encouragement of diverse representation within the historical record. A few of the SAA ethics include encouraging professional relationships, professional judgment when assessing records, mindfulness of security, the importance of privacy for the researcher, the institution and donors, and overall trust.

Top Five Recommendations

There are five key recommendations, which encompass the many nuances of a collections management policy, preservation management policy, and researcher accessibility:

- First, develop a collections management policy that includes a statement of purpose, a mission statement, an acquisition policy, a collaborative collecting policy, and a deaccession policy that connect to the overall mission statement.
• Second, develop a preservation management policy that addresses proper
temperature and humidity management, suitable storage and shelving,
safeguarding from light, careful handling and preservation techniques, and an
emergency plan.

• Third, turn the County Room into a separate researcher room with tables, chairs
and computer access to the Past Perfect Museum database.

• Fourth, create a researcher room policy that includes rules and regulations of the
research room, hours of operation, security measures, and an explanation of
copyright and fair use.

• Fifth hire an academically trained archivist to ensure that MHS is protecting and
managing their historical records to their fullest potential.

Conclusion

MHS is part of a large community of historical agencies throughout the country that
endeavors to forge a connection between local communities and their local history.
MHS faces the challenging task of preserving and sharing Martinez’s tangible historical
memory. It is a daunting but rewarding task for anyone to undertake. Resources tend to
be stretched. Volunteers have other obligations to fulfill. An historic home has only so
much space. But without this multifaceted effort, a community’s historical memory has
the potential to be lost. We all need to remember the origins of our past and current
communities because it is part of our essence that makes us interesting as an individual and as a community.

This report has outlined numerous recommendations based on current archival best practices, and ranges from costly to the cost efficient. Top five recommendations have been listed in order to provide MHS with easy first steps to using best practices in order to use their facility and historical resources to their fullest potential.
APPENDIX B

Martinez Historical Society Mission Statement

Martinez Historical Society Membership Benefits
Martinez Historical Society
MISSION STATEMENT

The mission of the Martinez Historical Society shall be:

TO COLLECT items relating to the history of Martinez and the surrounding area and to deposit them in locations that are convenient for both researchers and the general public.

TO PRESERVE the history of Martinez & to preserve physical objects related to that history.

TO STUDY AND DISCOVER new information about the history of Martinez.

TO EDUCATE the community about history. To arouse interest in the study of history.

TO DISPLAY owned, borrowed or leased collections for the benefit of the public.

Our mission is fulfilled in the following ways:

STORAGE FACILITIES – To provide space to collect, conserve & safeguard historical materials. To provide fire-proof storage space for the most valuable and irreplaceable items. To provide sufficient space to enable researchers to comfortably work with materials — and to minimize the culling, de-accession & dispersal of materials. To catalog materials to facilitate retrieval from storage when needed.

LIBRARY FACILITIES – To provide shelf space for histories, genealogies, biographies, newspapers, pamphlets, circulars, programs, posters, photographs, manuscripts, letters, diaries, journals, maps, surveys, field books, oral histories and public documents in both print (paper) and other media. To provide off-site backup of materials in digital format.

RESEARCH & EDUCATIONAL MATERIALS -- To purchase materials of value to researchers. To create an environment which encourages donations of materials. To provide access to, and copies of, materials to all researchers. To assist the public to find the information that fits their needs and to deliver that information to them. To provide these services in a helpful and welcoming environment. To promote the discovery of new historical information about Martinez within the framework of the state and nation in which it exists.

MUSEUM FACILITIES – To provide public display space for pictures, photographs, paintings, relics, historical artifacts, hands-on exhibits and activities for children and adults in clean, safe, well-lit and attractive locations.

EDUCATIONAL PROGRAMS – To host tours of our facilities and to host public lectures, meetings, workshops and presentations on site. To set-up educational exhibits in our own facilities and elsewhere. To host or support tours of the community’s historic homes, businesses, and historic locations. To publish, and to support publication efforts by others. To provide press releases. To support initiatives by newspapers and magazines to publish Historical Society materials. To create videos, and to support their creation by others. To provide material for radio and TV programming. To maintain a website and post historical information on the internet. To provide lectures & slide shows to the community, or to support others who wish to do so. To assist teachers in developing classroom materials.

HISTORIC PRESERVATION – To identify and place plaques on historic buildings. To prepare or to support the creation of historic structure inventories. To support property owners who wish to preserve, convert and continue the use of the historic buildings in Martinez.

COLLABORATIVE EFFORTS -- To work with other historical societies to maximize the preservation of historical materials and to deposit the materials in the appropriate location for researchers and the general public. To co-operate with schools, local government, community service organizations, arts groups and other appropriate organizations such as national museums to accomplish more of the Historical Society’s objectives than would be possible by working alone.
# MEMBERSHIP BENEFITS

**MARTINEZ HISTORICAL SOCIETY**

P.O. Box 14
Martinez, California 94553

Website: [www.MartinezHistory.org](http://www.MartinezHistory.org)

<table>
<thead>
<tr>
<th>Newsletter</th>
<th>Receive our bi-monthly newsletter which includes:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Interesting and informative articles about our town’s history.</td>
</tr>
<tr>
<td></td>
<td>- Notice of upcoming events.</td>
</tr>
<tr>
<td></td>
<td>- Up-to-date information regarding our Museum’s current exhibits, newly acquired accessions &amp; other items of interest.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Library Access</th>
<th>Utilize our library &amp; archives to research:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- Your family history (or family tree).</td>
</tr>
<tr>
<td></td>
<td>- History of your Martinez house.</td>
</tr>
<tr>
<td></td>
<td>- Other local historical information.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Events</th>
<th>Attend our frequent social events:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- A variety of history lectures, teas, open houses, special exhibits and other events throughout the year.</td>
</tr>
<tr>
<td></td>
<td>- Priority for tickets to our famous Crab Feed -- with its huge number of raffle prizes.</td>
</tr>
<tr>
<td></td>
<td>- The annual Home Tour featuring well-preserved or sensitively renovated homes which represent the town’s rich history and architectural heritage.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Community Projects</th>
<th>Our many projects and community services include:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>- The Martinez Museum (in the historic Borland Home) and its exhibits:</td>
</tr>
<tr>
<td></td>
<td>1005 Escobar Street, Martinez, California</td>
</tr>
<tr>
<td></td>
<td>Hours of operation:</td>
</tr>
<tr>
<td></td>
<td>Tuesdays 11:30 – 3:00 pm</td>
</tr>
<tr>
<td></td>
<td>Thursdays 11:30 – 3:00 pm</td>
</tr>
<tr>
<td></td>
<td>Sundays 1:00 – 4:00 pm</td>
</tr>
<tr>
<td></td>
<td>(Closed on 5th Sunday of the month.)</td>
</tr>
<tr>
<td></td>
<td>Other Days By special arrangement</td>
</tr>
<tr>
<td></td>
<td>- Restoration of the historic 1876 Martinez Railroad Depot.</td>
</tr>
<tr>
<td></td>
<td>- Placement of bronze plaques at historic buildings and other locations throughout Martinez.</td>
</tr>
<tr>
<td></td>
<td>- Publication of books &amp; booklets on Martinez history.</td>
</tr>
<tr>
<td></td>
<td>- Walking tours of our historic downtown – both guided and self-guided.</td>
</tr>
<tr>
<td></td>
<td>- Support of both day &amp; night tours of our pioneer cemetery.</td>
</tr>
<tr>
<td></td>
<td>- Special Museum tours by prior arrangements for groups and VIPs.</td>
</tr>
<tr>
<td></td>
<td>- Working with local schools. Tours for all 3rd graders in the community.</td>
</tr>
<tr>
<td></td>
<td>- Collection &amp; preservation of historical artifacts, photos, and documents from Martinez &amp; the surrounding areas.</td>
</tr>
</tbody>
</table>

If you are not a member and would like to join us, do one of the following:

- Visit our website at [www.martinezhistory.org](http://www.martinezhistory.org). Click on “Membership”.
- Visit our museum. Ask a docent to sign you up.
- Telephone Paul Kraintz, our Vice President of Membership, at 646-9143.
Bibliography


Bowen, Mark Bowden.

*A Survey and Evaluation of Historical Resources at the Farad Hydroelectric Power Facility, Floriston, California.* Project for Master of Arts in History at California State University, Sacramento, 2003.


California Historical Society. “History and Mission.” CHS.


California Historical Society. “Mission Statement.” CHS.


Kim, Monte George.  
*Public Interpretation as a Mitigation Measure in Cultural Resource Management.*  
Project for Master of Arts in History at California State University, Sacramento, 1999.

Kyvig, David E. and Myron A. Marty. *Nearby History: Exploring the Past Around You.*  


Office of Historic Preservation. “Regular Quarterly Meeting of the State Historical Resources Commission Agenda.”


U.S. Climate Data. “Climate Martinez, California.”
http://www.usclimatedata.com/climate/martinez/california/united-

http://focus.nps.gov/nrhp/GetAsset?assetID=187911d9-f2b0-4184-b8aa-

U.S. Department of the Interior National Park Service. “John Muir National Historic Site: Dr. John Theophile Strentzel.” www.nps.gov/jomu/learn/.../Dr-John-


