Research Library Volunteer Primer

This primer will serve as an introduction to volunteering at Coronado Historical Association's (CHA) research library. The primer is divided into three parts:

    (1) General overview of the research process
    (2) How to use specific research tools
    (3) Guidelines for historic property research

About 200 researchers make in-person appointments at the library per year.
Roughly 55% are conducting historic property research
       22% are researching for publications (such as the *Coronado Eagle & Journal*)
       13% are researching family history
       10% are conducting other research

Researchers interested in accessing CHA's collections can submit a research request to the Registrar, detailing the purpose of their research and the kinds of materials they are interested in seeing. Using this information, the Registrar will conduct a document search to find relevant materials. Once the document search is complete, the researcher can schedule an in-person research appointment to review the documents the Registrar has located.

Research volunteers can assist the Registrar with both the initial document search and the in-person research appointment. The below guidelines outline how you can help in the different stages of the research process.

General Overview of the Research Process

Conducting a Document Search for a Research Request

1. Taking the request (STAFF)
- When talking with a researcher about a research request, either via phone or email, fill out a **Research Request Form**. Be sure to fill out all sections with as much detail as possible, to better assist the document search.
- Novice researchers won't necessarily know the answers to some of the queries on the form (such as the kinds of documents they are interested in seeing), so be sure to query them about the project and their goals more generally so that you can accurately fill out these sections.
- To get an understanding of where they are at in their research, you can ask if they've completed a newspaper search (via California Digital Newspaper Collections), or if they've consulted any other libraries or resources thus far.

2. Researching a request (VOLUNTEER AND STAFF)
Once you have a **Research Request Form**, you can conduct online research and search CHA's collection itself to find material for the researcher.

There are three resources you can use to conduct your research:
(1) California Digital Newspaper Collections – an online database of Californian newspapers, including all Coronado newspapers.
(2) CHA's photograph collection – CHA's entire photo collection is searchable online.
(3) PastPerfect – an internal database that allows you to find materials housed in CHA's collection.

Detailed instructions on how to use each resource can be found in the next section of this primer.

Holding an In-Person Research Appointment

1. Pulling documents (STAFF)
- Before the appointment, you will need to pull the relevant materials you identified in your document search from "the vault" (ie. the archives).
- Use a cart and gloves when pulling material.
- When pulling materials, be sure to bring the **Research Request Form**, and write down in pencil the location of all material pulled (using the format of bay/row/shelf; for example, 4/3/1 would denote Bay 4, Row 3, Shelf 1).
- Do NOT pull any actual photos. For researcher appointments, simply show any relevant photos on the computer in the research library. You can do so via PastPerfect or the online photograph collection.
- For especially delicate materials, discuss with the Registrar whether you pull the object for the appointment. In some cases, you can instead share pictures of the material to the researcher, or closely supervise the researcher's review of the material.

2. Prepare the library for the appointment (VOLUNTEER)
Immediately before the appointment, make sure that there are enough supplies for the researcher. Make sure the following are accessible:
- Sharpened pencils

- Gloves
- Scratch paper for notes
- Blank **Photocopy Request Forms**
- Blank pieces of colored paper for photocopies
- The researcher's **Research Request Form**

3. Orientation for the researcher (VOLUNTEER)

The CHA research library is a community resource. We want people to feel welcome—especially since conducting research can be an intimidating and overwhelming process for first-time researchers. At the same time, it is our responsibility to ensure that materials do not get harmed during research appointments. The following guidelines and rules help ensure that researchers feel welcome and well supported to handle our rare materials with care.

Once the researcher has arrived, you will need to give a quick orientation that covers the following:
- **Welcome the researcher to the library**
- **Provide a services overview of the research library**
- **Go over the library rules**: House rules are listed on the **Research Request Form.** You should memorize these. There are a few in particular to keep in mind while conducting the research appointment:
  - Pencils, <u>not</u> pens, should be used for any personal notes. Laptops are also allowed.
  - Researchers should wear gloves if handling materials.
  - Researchers should put all personal belongings (such as bags and backpacks) in the designated area in the library for belongings.
  - Eating and drinking is not allowed in the library. People may have water, as long as it is in a closed, lidded container.
  - Researchers can take photos of the materials with their personal or phone cameras unless the material in question is copyrighted. See the "<u>Photocopying and photos</u>" section below for more details.
- **Offer guidance on handling materials**
- **Sign in**: At the start of every appointment, researchers will need to sign the **Collections Use Agreement & Registration** form, which is on the backside of their **Research Request Form**. This agreement lays out the house rules listed above. Depending on the sensitivity of the materials they will be reviewing, the Registrar may ask that they also provide a photo ID so that she can make a photocopy for CHA's records.

4. Monitoring use of materials during the appointment (VOLUNTEER)

During an appointment, sit nearby to offer help and keep an eye on things. The materials at these appointments are museum objects, and are often irreplaceable. It is thus important to minimize theft, while also ensuring that the community feels that they are welcome. For especially delicate items, offer to handle directly (as discussed in the "<u>Pulling documents</u>" section above).

5. Photocopying and photos (VOLUNTEER AND STAFF)

If a researcher would like to reprint, publish, or otherwise distribute CHA material, please refer them to the Registrar, who can assist with a **Non-Exclusive License Agreement**.

If researchers would like copies of material for their personal research purposes only, we can make photocopies for $0.25/page <u>unless</u> the material in question is copyrighted or owned by a third party. This is especially common for photographs and books. The **Research Request Form** for the appointment should note any materials that are copyrighted; please review this sheet before the appointment. You can also double-check the rights status of material (ideally *before* an appointment) by doing the following:

- *Collections material, including photographs*: in PastPerfect, check the "Provenance" section to see if the photo is copyrighted and or privately held (and thus, cannot be photocopied, printed, or distributed by CHA). See section below titled "How to Use Specific Research Tools" to learn more about how to use PastPerfect. **When in doubt, you can always just ask the Registrar!**
- *Books*: books are always copyrighted. It is okay to make a handful of photocopies if it does not exceed the fair use threshold. Any misuse or copyright infringement would be the fault of the researcher. Again, **when in doubt, feel free to ask the Registrar** for guidance on photocopying a book.
- For materials that CHA cannot photocopy, researchers can apply directly to the rightsholder for a photocopy.

When a researcher requests photocopies that we can make, fill out the **Photocopy Request Form** with all of the requested photocopies. The researcher can use blank colored scratch paper to bookmark the relevant pages. Once the researcher has reviewed all materials and has a finalized list of requested photocopies, you will give the **Photocopy Request Form** to a staff member, who will make the actual photocopies so that you can remain in the research library with the researcher.

6. Check out and follow up (VOLUNTEER)
At the end of a research appointment, you will need to do the following:

1. Pay out any photocopies: The **Photocopy Request Form** serves as a receipt for any photocopies made. At the end of the appointment, take the researcher down to the museum store cashier with the **Photocopy Request Form** so that the researcher can check out.

2. Update Excel spreadsheet: Once the researcher has left, enter the details of their **Research Request Form** into the spreadsheet that tracks research appointments.

3. File paperwork: File the **Research Request Form** and the **Photocopy Request Form** for the appointment in the designated file cabinet.

4. Follow up with researcher: In 1-2 weeks, follow up with the researcher to see if they found what they were looking for.

How to Use Specific Research Tools

California Digital Newspaper Collections – https://cdnc.ucr.edu/cgi-bin/cdnc
This is a great place to start your research. The CDNC is an online database of Californian newspapers, and luckily includes all of Coronado's newspapers. The CDNC has articles dating from 1846 to the present (with an approximate six-month delay for new articles). Much of Coronado's history starts in approximately 1886.

To search by keyword:
1. Go to "Search" on the upper navigation
2. Enter a research keyword
3. Filter by date if desired
4. Filter by newspaper to get local results only. For Coronado, include all newspapers beginning with "Coronado" and *El Patio*. You can select multiple newspapers by holding the Ctrl key as you click the newspaper names with the mouse.
5. Click the "Search" button

Once you get search results, you can also filter by category or decade. Categories include articles, ads, and illustrations (article + picture).

You'll notice that when you click a search result, it will bring you to the scan of the newspaper, with the article and keyword search terms highlighted.

To save an article, right click the desired article, and then select "Clip this article." Then, print the article, sending it either to the local printer, or send it to "Save as a PDF".
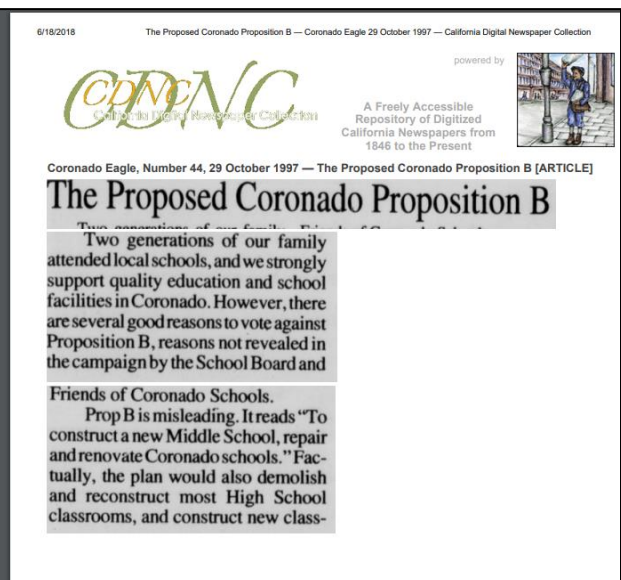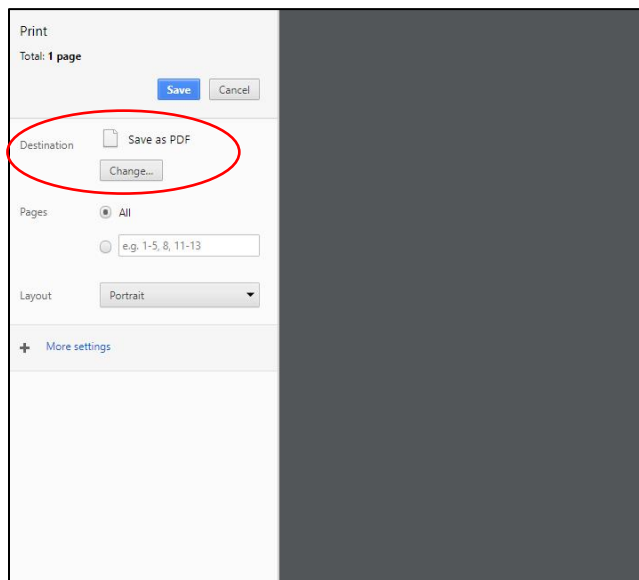
Optimizing search terms
When choosing search terms, be creative. Try variations of the same wording to yield different results. Sometimes reading a few of the search results themselves will give you ideas for new search terms. For example, when researching the old Red Cross building, some articles referred to it as the Red Cross Headquarters. "Red Cross Headquarters" could be a new search term to use.

How to use CDNC for historic research
For historic home research, newspaper articles can help determine how old the home is, and if there are any significant historical events, people, or items associated with the building. Search the home's address, previous homeowner and occupant names, and any known architects or builders of the home.

Using CDNC during research appointments
During a research appointment, you can ask a researcher if they've done a newspaper search. If they haven't and they'd like assistance, you can go through approximately 10 articles with a researcher. It can be helpful to pick a date range, for example, and review those handful of articles with the researcher. Since researchers are able to use CDNC from home, encourage them to do any further research on their own. Our goal is to facilitate their research, not conduct it for them.

CHA Photograph Collection – http://coronadohistory.pastperfectonline.com/advancedsearch
Researchers can search CHA's photo archives from home as the collection is available online.

Please note that **not all images are free to use**. Some need permission before they can be printed or distributed. Researchers should be in touch with the Registrar with any use questions.

The search by keyword:
1. Go to "Keyword Search" on the upper navigation.
2. Enter a research keyword.
   o Keyword searches use OR as the default connector between words (e.g. a search for *Coronado ferry* will return records associated with *Coronado* OR *ferry*)
   o If you want to find records where both keywords are found, type in AND between the two words.
   o To search for a specific phrase, put the phrase within quotes (e.g. "Coronado Ferry").
   o The asterisk (*) works as a wildcard (e.g. a search for *histor** would come up with records containing *history*, *histories*, *historical*, etc.).
3. Click "Search."

To search by multiple parameters:
1. Go to "Advanced Search" on the upper navigation.
2. Utilize keywords in specific search categories to yield more targeted results. For example, searching *White* in the People field will bring up any records associated with a member of the *White* family, without having to sift through black & *white* photographs.
3. Click "Search."

| Home | Keyword Search | Advanced Search | Random Images | Photos |

Search Hints: To search by phrase wrap your criteria in quotes. ex: "Find me"

☑ Photos
☑ Creators ☑ People
☑ Containers

Catalog Number
Object Name
Date
Year Range from
Year Range to
Description
Place
People
Print size
Title
Collection
Donor
Search Terms

Search categories

SEARCH

Reset

PastPerfect

PastPerfect is an internal database that allows you to find materials housed in CHA's collection. Unlike CDNC and the CHA online photograph collection, outside researchers are <u>not</u> able to use PastPerfect. PastPerfect is for staff and volunteer use only.

There are many different approaches you can take to searching through the collection with PastPerfect. Keep in mind that PastPerfect is a database maintained by humans – which means that not everything is entered consistently and perfectly! If you are having trouble yielding any results, problem solve and get creative. Use different kinds of searches for the same query (for example, search by keyword, person, description field, etc.). If you are looking up a tricky name, try searching for common misspellings or variations (for example, for Bob try Rob and Robert).

Targeted field searches via the COLLECTIONS box:
On PastPerfect's home screen, the "COLLECTIONS" box allows you to search specific fields of all the cataloged records. For example, you could target the "Description" field with a keyword, or the "Year Range" field if you have a specific date and believe the catalog would have recorded dates for that item.

First, decide if you want to search the collection's objects, photos, or archives. Most often you will be looking through the collection's photos and archives.
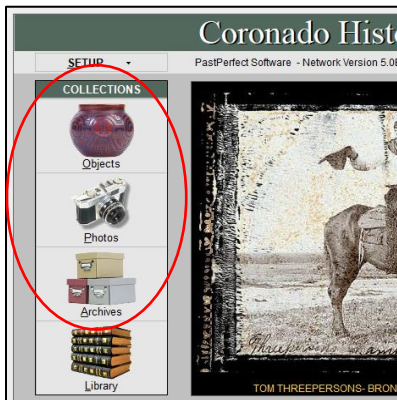
Once you select a category, click Find.
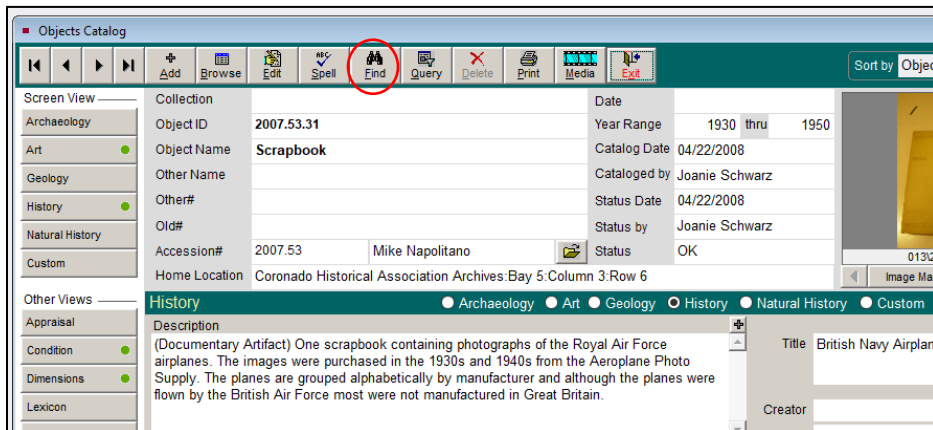
Use the darker gray "Field Search" area to make a targeted field search. Useful fields to search include:
- *For archives*: Scope & Content, Title, Dates of Creation, Year Range
- *For photos*: Description, Title, Provenance
- *For objects*: Description, Title, Provenance, Material

Before you do your search, it can be helpful to look at any random record, to see what fields are typically filled out.

Once you have your search field and keyword, click "Search Now." Results will appear in the box below; you can select a record and click "View Selected Catalog Records" to see the record.
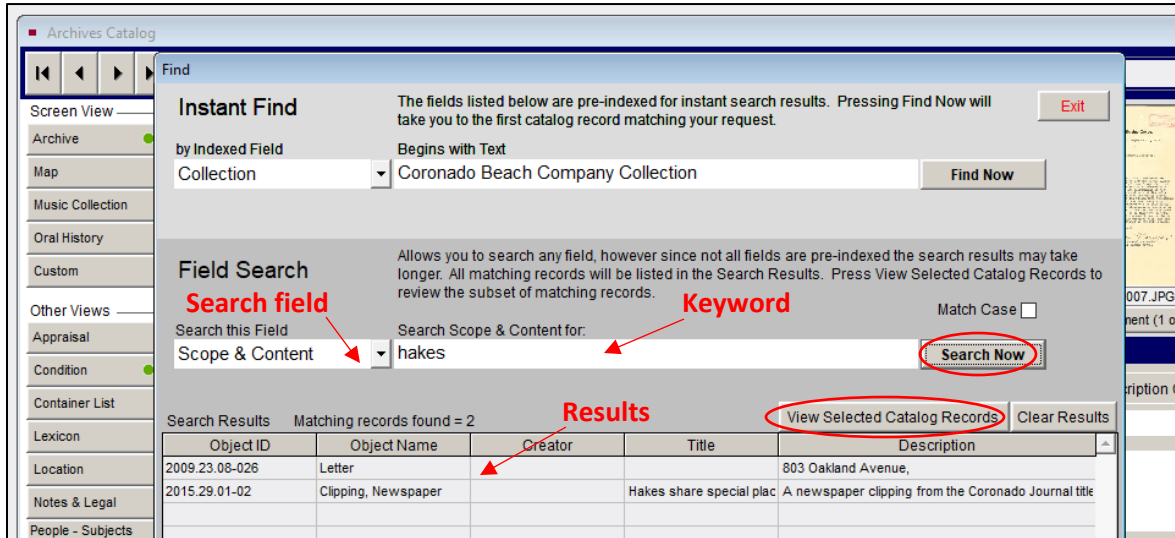
Once you select a record, you can navigate between all the results with the arrows on the upper left corner.
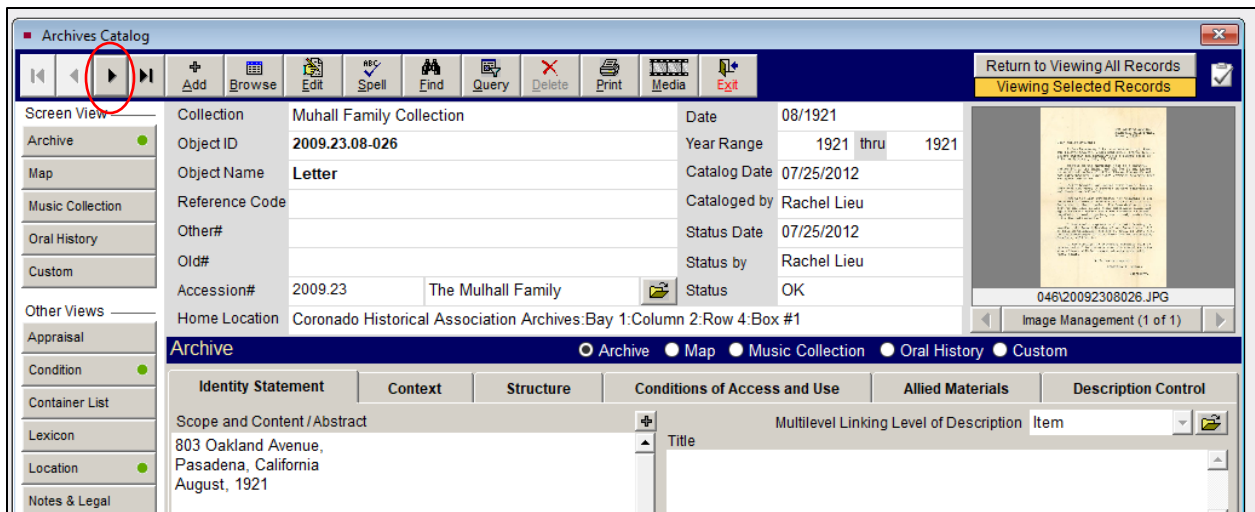
Searching via the RESEARCH box:

On PastPerfect's home screen, the "RESEARCH" box offers a number of ways to search the collection.

- *By keyword:* This searches the collection by keyword. Up to five keywords can be entered here.
- *By lexicon:* This searches the collection by types of objects. For example, you can use this search to bring up all of the shoes housed in the collection.
- *By person search*: This search brings up all of the catalog records associated with certain names. If you know the homeowner or architect of a building, for example, you could find any material associated with that person through this search. Be sure to check for both the first and last name.
- *By search term:* This search has preset search terms that you can scroll through and select.

Third-party ownership:

When collecting materials, it is important to note if any of them are privately held or copyrighted. This means that CHA does not have the right to photocopy or distribute the material. This is often the case with photographs.

Please note on all **Research Request Forms** if a material's rights are restricted in this way. This will let whoever is holding the research appointment know if they are allowed to make photocopies of the material for the researcher.

To determine if a material is privately held, check the "Provenance." If someone other than CHA is listed as owning the material, CHA is unable to make a photocopy of that material.
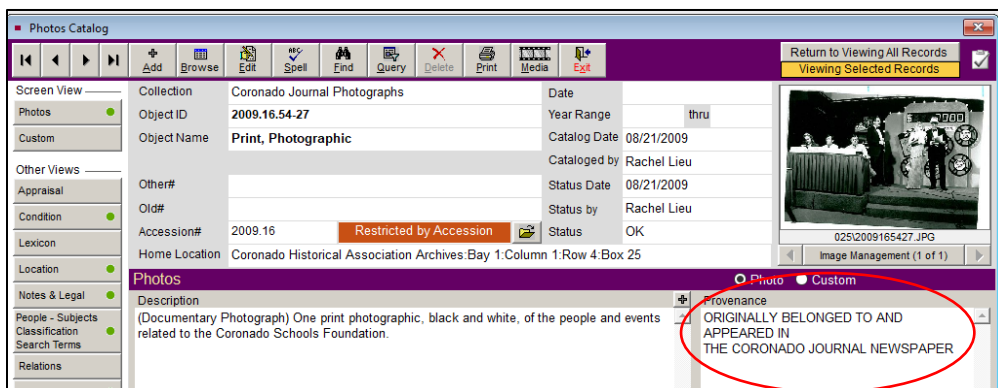
Guidelines for Historic Property Research

Why do people research the history of properties in Coronado?
Many of the researchers visiting CHA are conducting historical property research. Historical designation provides protection for buildings that are deemed historically significant to Coronado. Many people apply for historical designation in order to enjoy reduced property taxes via the Mills Act. Conversely, some property owners are researching the history of their homes in order to determine that it is <u>not</u> historic. In Coronado, buildings that 75+ years old need to be deemed not historically significant before any property owners can proceed with renovations or demolitions.

The CHA research library has pamphlets from Coronado's Historic Research Commission that outlines the process for deeming a property historic or not historic. Since researchers might have some questions on the process, it is a good idea to read through those pamphlets to get some background. You can also direct researchers to the website for Coronado's Historic Preservation program –
https://www.coronado.ca.us/cms/one.aspx?pageId=1619269

Conducting historic property research
The main question the researcher needs to answer is whether or not the building is significant to Coronado's history. When making their determination, the Historic Research Commission considers:

1. **History:** If the building reflects special elements of Coronado's military, cultural, social, economic, political, aesthetic, engineering, or architectural history.
2. **Significant people and events:** If the building is associated with a person or an event significant in local, state, or national history.
3. **Architectural style:** If the building possesses distinctive characteristics of an architectural style, and is valuable for the study of a type, period, or method of construction, and has not been substantially altered.
4. **Significant builders and architects:** If the building is representative of the notable work of a builder, designer, architect, artisan, or landscape professional.

Thus, try to keep the following questions in mind while assisting with historic property research:
- Are there any historically significant places or things associated with this building? For example, was the building a community landmark, such as the Old Red Cross building?
- Are there any historically significant people associated with this building? Consider the homeowners, tenants, other occupants, builders, and architects associated with the building.
- Are there any historically events associated with this building, such as parties or community meetings?
- Did the address ever change for this building? Was the building ever moved from a different lot? If so, look into this history, and see if any associated addresses were ever historically significant.
- Does the building represent a distinct architectural style? Has the building maintained that style, or has its appearance been significantly altered by any additions or demolitions?
- Does the building represent a notable work of a prominent builder or architect?

Resources at CHA

CHA has a wide variety of materials that can help researchers learn more about the history of their home.

Building permits: Building permits are useful for showing the history of the home or building. Permits can show when a major alteration happened, if there was ever structural damage like a fire, dates of building and alteration, and names of builders and architects.

Sanborn maps: Sanborn maps are detailed city maps that were created to aid fire insurance companies in assessing their liabilities. As such, a Sanborn map shows every building in Coronado, including dwellings, house garages, public buildings, parking garages, etc. Reviewing the legend for Sanborn maps is especially useful. The legend is located in the research library.

Sanborn maps offer a great way to see the construction history of a home over time. However, be careful regarding the date when evaluating a Sanborn map. Instead of making new Sanborn maps each year, whenever there was a change to a building – whether it be an addition or a demolition – the publishers of Sanborn maps would paste a clipping of the new building on top of the old map. Look to the map's index to see if they recorded the dates of new clippings. Another useful trick is to hold the flashlight on your cellphone against the page, to see the shadows of all the added clippings, to see how many times the building altered.

Unfortunately, the glue used to affix the clippings to the map can disintegrate over time, which means that the clippings can fall off the map. Thus, it is important to consider Sanborn maps in the context of all the other information you collect during your research.

Source Point: In the 1980s, a Coronado professor and his graduate students created an inventory of Coronado homes called Source Point, where he classified each home on a scale of historical significance. Accordingly, Source Point is a good starting point for research, as it has a fair amount of information and can give you ideas of where to look next. However, please keep in mind that Source Point was never formally adopted by the city of Coronado. Source Point is simply one historian's judgment, and should not be taken as a definitive ruling on the historical significance of a house.

Photos: Our photo database is a unique resource to CHA. Historic photos of properties can show what a home looked like decades before, to see if a home has maintained its original architectural aesthetic. We do not have photos of every house since our collection was built entirely by donation. Because these images are fragile and unique, we do not pull the physical copies for research appointments. All of CHA's photos are available for viewing on the online archive.

Builder and architect folder: CHA staff have compiled basic research on notable builders and architects in Coronado. If you know the architect or builder of your building, it can be helpful to look through this folder to see if they were active in Coronado, and if they have any other properties that have been historically designated. This resource is not necessarily comprehensive; that is, if your architect does not appear in the folder, that doesn't necessarily mean that he or she was not prominent. This resource should thus be used in conjunction with an online newspaper search via CDNC.

Land deeds: Land sales show the early history of a building. They are not as helpful of a resource with regard to determining historic significance since they show the sale of the land itself, not the building on top of it. Land deeds are, however, an interesting resource that CHA exclusively has, and they provide some background and information on property value (such as if the lot was once farmland). Generally speaking, you do not need to review these with researchers unless they specifically ask for them.

Miscellaneous archival material: It is always a good idea to search PastPerfect for any miscellaneous archival material CHA may have that relates to the building in question. Good keywords to search include

the address and the names of any homeowners, occupants, builders, and architects associated with the building.

Resources outside of CHA
Researchers can visit other institutions throughout San Diego to further their research. Below are a few helpful places to visit, and the resources they can find there:

- **County of San Diego**: assessor maps
- **Coronado Public Library**: Ancestry.com, complete Coronado phone directories, some photographs
- **San Diego History Center**: *San Diego Union Tribune* newspapers on microfilm, various subject files and photographs, information on big architects
- **CDNC**: feel free to offer potential keywords for their online newspaper searches at home