

Getting the Most from Your Research Trip:

Best Practices in Archives, Libraries, Museums, & Historical Organizations

1. **Make an appointment in advance!** You will get much better results when you do. Unless you have a very specific document you already know is at the institution, staff need to do pre-research research or a referral to staff with specific expertise in advance of your visit. “Pre-research research” is often needed to be done by the researcher and staff before visits. Some materials may be housed offsite or in storage and time and labour is needed to do retrievals. Familiarize yourself with procedures (e.g. request forms) and hours (e.g. holiday closures).

In summary: drop ins are not the ideal situation for researchers or staff. In many institutions, there are not a large number of staff, and they are multitasking, so may not be able to accommodate drop ins at all but could with advance notice. Be mindful of the timing of your request; a message the evening before or on the weekend for a Monday appointment likely won't be seen by staff and won't provide enough time to prepare.

2. **Narrow your question as much as possible.** Make your query succinct and briefly outline what you already have so staff prep time is not wasted duplicating information you already have. Say what you already know without adding unnecessary detail. What is your research starting point? *Examples:* being specific “I am trying to find out who were the parents of X;” too broad “What do you have on X?”

3. **State where you are located** in your introductory message. Do you plan to visit in person, or is this not possible? Then staff can better tailor access to documents. If you are given various options for access, please be clear what route you would like to pursue and not just repeat the initial query.

4. **Remote research:** There is an increasing expectation that researchers do not have to travel to institutions, and they should be able to request someone onsite to do research or that the material they need is easily digitized. Do not assume staff at the institution you are contacting are able to do remote research/ copying/ digitization.

Remote requests are usually more feasible if you have an exact document citation with a specific document you need. Please double-check your citations; staff may not have to retrieve and search material a second time if you make an error in your request.

Most institutions do not have staff exclusively devoted to responding to research requests, and many only have people doing so on a volunteer basis. There may be a charge for staff time and/or copying- this is usually very reasonable considering the amount of effort and expertise that is put into queries. Asking politely (not demanding) and with precise, well written questions will increase the likelihood of getting more help!

5. Come prepared to do work and spend time. Don't expect research to go quickly! Historical research takes many hours, days, weeks, and years. Do pre-research: you should have good background in secondary reading before getting into primary sources (e.g. read a book about the New Jersey Volunteers before diving into their muster rolls)

Be organized and plan ahead. Ask about costs associated with copying or other procedures, and what methods of copying (photocopying, scanning, photography) are possible. Bring any records you need to do research and reference and have them ready. Have all the materials you might need in a research kit: pencils, laptop, camera, memory stick, notebook. Come with a plan of what materials you want to use and list of priorities; just getting there and "seeing what they have" is not usually a great plan. Look at online catalogues and finding aids in advance. Your plan may change as you view the material.

Don't expect staff to do research for you (i.e. spend hours going through documents) or do the interpretation of documents; that is not their role, you should be as self-sufficient as possible. Staff often have a wealth of knowledge, but archives can have extremely extensive holdings, and no one can be an expert in every record. The record you are using may not have been looked at for years, and you will become the expert on the material!

7. Please be on time (early or late can make it difficult for staff that are multitasking) and let staff know if you need to cancel as soon as possible. Do not come to appointments if you are sick.

8. Keep excellent records: Carefully name any digital files and record citations to avoid confusion and repeat visits (e.g. undated newspaper clippings). When requesting documents, provide the most detailed citation possible and where you found the citation (e.g. "I am looking for RG 34, folder 3, document 12, muster roll of loyalist at Passamaquoddy in 1783" instead of "You have a muster roll from 1783 of loyalists in your archives")

Double and triple check your citations! When possible, indicate what the source of the reference comes from (e.g. our catalogue, a footnote in a particular book) Staff may only have limited time to find documents, and you could be out of luck if you make an error in your request. For your own use, keeping and storing records securely in a digital format is best practice for future use.

9. Digitization discussion: Don't expect everything to be available to be digitized or easily digitized. There are many, many ongoing digitization projects that have been in progress for decades, but only the surface has been scratched on digital access to historical documents globally. It is extremely time and labour-intensive and takes various pools of knowledge and skills, not only in prepping archival material and scanning/ photographing, but also processing images, quality control, dealing with copyright restrictions, file naming, and staging online.

Many researchers automatically request digital material rather than visiting archives; be aware this is generally a more time-intensive process for staff than coming to view the items in person, and there is usually no more staffing to account for the rising requests for digitization. However, please do a search online for material you need that may be digitized; a quick Google search will save institution staff time and allow you to use your research time wisely (such as Internet Archive and HathiTrust). Ask about in-house institutional subscriptions to historical databases.

10. **AI Research:** Be very cautious using artificial intelligence applications when doing online research. The process will often come up with false or incorrect information which wastes staff time looking for records which do not exist. Many institutions are creating policies whereby they will not assist with research queries that were produced by AI.

11. **Copyright** is not always straight forward. If you plan on publishing either digitally, online, or in print, you need proper permissions. Sometimes institutions can provide copyright permission, but in other instances copyright resides elsewhere. There may be a cost associated with copyright permissions. It is your responsibility to make sure Canadian copyright law is followed in any form of publication. It is good practice to also include the institution where you found the document or image, even if they do not hold copyright.

12. **Ask staff** for other recommended resources, such as other institutions and additional sources. *Note:* please do not send multiple queries with the same questions to various people/ units in the same institution and even to different institutions. This can cause staff to waste limited time available as it duplicates work. Give time for one institution to respond before sending additional queries to avoid wasting staff time. If you are picking up queries after many years, be aware there can be staffing changes and turnover, as well, staff may not remember your initial interaction if you can summarize previous queries.

Be thankful and acknowledge the work of staff, even the receipt of documents or research information. Please do acknowledge emails that staff have taken time to research and write with information for your specific case. Do not take credit for work staff did on your behalf, i.e. Stating “I discovered/ uncovered this in the archives.”

Final Advice

- Be wary of repeating mistakes from books and researchers in the past. Always go to primary sources and pursue the source of the original information.
- Keep an open mind. The practice of history is removing as many biases as possible. Even if what you find is not what you expected, it can still be important and interesting!
- Research is hard! It takes time, and lots of dead ends.

Archives are for everyone! Don't be intimidated. Stick with it, and you will gain experience.