



P.E.O. HISTORICAL COLLECTIONS GUIDELINES FOR LOCAL CHAPTERS

HISTORICAL COLLECTIONS DEFINED

Historical collections or archives are accumulations of historical records, in any media, that are unique to local chapters. They may include records of noteworthy events and individual accomplishments of members.

PURPOSE OF HISTORICAL COLLECTIONS

The purpose of historical collections is to sustain the continuity of the mission at the local chapter level. Historical collections enable members to understand the issues and activities that influenced the accomplishments of the organization and the people who participated. All collections must safeguard private member and project applicant information so that it is available only to other members.

Members learn about:

- the history of women's education
- the organization's roots and its role in the larger movement of women's empowerment
- trends in women's organizations: fundraising, outreach, achievements, governance
- the stories of individuals who made an impact and can serve as examples for their own goals

Information is accessible to members:

- via publications of the s/p/d and local chapters (newsletters, social media, etc.)
- in indexes and through inquiries to the s/p/d chapter historian/history committee
- through displays at s/p/d conventions, reciprocities and other gatherings

RESPONSIBILITY FOR HISTORICAL COLLECTIONS

It is recommended that each local chapter have a historian, appointed by the chapter president, who maintains the chapter's collection.

MAINTENANCE OF HISTORICAL COLLECTIONS

Local chapters should regularly review how the collections are preserved. Considerations include space, budget and ability to identify materials for future use. Whether historical collections are paper or digital, they should:

- be sustainable, ensuring that whatever choices a local chapter makes can be managed into the future
- have a current inventory list that is held by more than one person
- be accessible by more than one person

GOVERNING RULES FOR LOCAL CHAPTERS

P.E.O. policies take precedence. They can be found in:

- Constitution, Bylaws and Standing Rules of the P.E.O. Sisterhood
- Instructions for Officers of Local Chapters (IOLC) – including retention schedules
- S/P/D Bylaws
- Local Chapter Bylaws

Storage

- In 2008, the Executive Board of International Chapter introduced the written requirements for acceptable storage of historical items for local chapters in IOLC.
- Local chapter minutes, yearbooks, directories and/or historical memorabilia with private/personal identifying information of members or project applicants/recipients may not be housed in a facility (e.g., library, museum, college archives, historical society, etc.) which would allow access to the materials by the public (anyone other than P.E.O. members).
- General historical memorabilia not containing private/personal identifying information may be housed in a facility which would allow access to materials by the public.
- Each repository has its own governing policies that may conflict with P.E.O. policies, may curtail access to materials or may apply their own archival standards for disposal. Moreover, contact with the local chapter may be lost. If historical memorabilia are housed in a facility with public access, the governing policies of the repository may dictate that it is no longer “owned” by the P.E.O. chapter or its members. Care should be taken in determining which articles to make available for public access.

Local chapter historian/history committee should:

- be familiar with existing P.E.O. policies
- create and maintain inventories of historical materials
- ensure that a current copy of the local chapter’s inventory is retained by a chapter officer
- create instructions for paper and digital records and management (file naming protocols, locations of multiple copies)
- avoid duplication
- be familiar with current technology if digital records are created
- organize paper or digital records in a logical method (chronological or by event)
- identify printed photographs: event, date, names (Do not write on photos with a ballpoint pen to avoid denting the paper. Use soft pencil only.)

Local chapter historian/history committee may:

- save digital versions in standard formats: Word, .pdf or pdfa
- save digital photographs as .jpg or .tiff at a minimum of 300 dpi; identify with file names: date, event and chapter letters; metadata should include names of people

PRESERVATION AND ACCESS

Local chapters should determine feasible formats to maintain and provide access to historical information. If a digital option fulfills a chapter’s needs, it should be sustained for the long term. Chapters may use an outside source for private/secure scanning of documents, including minutes.

Various Ways to Maintain Records

- **primarily paper records in plastic containers:** stored in a secure, relatively stable environment; space is unlikely to cause mildew or other degradation
- **mix of paper records and digital backups:** stored in a secure, relatively stable environment; digital backups are in multiples or cloud storage; more than one chapter member is designated to maintain copies of the digital backups
- **primarily digital records with backup redundancy and some paper examples:** digital files are at least 120 dpi in formats that can be accessed by standard software; pdfa is preferred but .pdf, .jpg and .tiff are acceptable; information can easily be migrated as technology changes; multiple digital backups shared easily with relevant members using flash drives, external hard drives or the cloud

SCRAPBOOKS AND PHOTOGRAPH ALBUMS

Scrapbooks and photograph albums present space and preservation challenges. Since taking them apart is counter to archival standards, it is recommended that other storage methods be considered moving forward. Alternatives for organizing physical documents and photographs include labeled folders or books developed with online self-publishing platforms (e.g., Snapfish, MixBooks, etc.). Photographs or scans of scrapbooks allow the most fragile to be preserved and easily accessed without disturbing the original materials. Storage of the digital images should adhere to guidelines listed above.

LOCAL CHAPTER HISTORICAL COLLECTIONS

What may be included but is not required:

1. Facility with access by P.E.O. members only
 - a copy of the chapter's charter
 - chapter yearbooks – one per year at most
2. Facility with public access (typically governed by repository agreement that shifts ownership to the repository)
 - obituaries of members – print of online listing or photocopy of newspaper clipping. It is not recommended to keep actual newspaper clippings.
 - 50-year member biographies
 - member accomplishments outside of P.E.O.
 - special events photos and flyers
 - memorabilia in limited quantities
 - newsletters
 - philanthropy recipients: name and most recent contact information, image and biographical information
 - digital photographs with a filename that includes: chapter letters, names, dates and location. Be selective.

What may not be included:

- legal and financial documents (local chapter officers refer to IOLC for retention schedules – president, recording secretary, corresponding secretary, treasurer); minutes in perpetuity, paper for 10 years, then digital; presidents' letters, paper for 10 years, then digital (summaries of chapter activities, typically one to two pages)
- disbanded and merged chapters – consult with the s/p/d organizer regarding the policies of returning supplies
- spouse, family member or other nonmember information
- all versions of the President's Book, prompter's parts and initiation booklets

JOB DESCRIPTION OF LOCAL CHAPTER HISTORIAN/HISTORY COMMITTEE

Suggested skills:

- organizational skills and preservation awareness or experience
- ease with standard technology platforms and software in order to use documents, digital photographs and a variety of presentation methods
- writing skills to share information with members

NOTE

Each local chapter should make reasonable efforts to maintain its historical collections. All historical collections housed in non-P.E.O. repositories, which predate the 2008 guidance from International Chapter, are subject to the terms of the original gift agreement and the policies of the individual repository.