



AAPA 2024 Session

PA HISTORIAN TOOLKIT

Reference Guide



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Section 1: Introduction

The PA History Society's *PA Historian Toolkit* is designed to help educational programs, chapters, special interest groups, and other organizations identify, gather, organize, and maintain materials that document the history of their PA programs and organizations according to archival standards and to make these records available to their constituents and to the public.



The toolkit assists historians and record keepers to:

- Understand the basics of archiving and what types of materials to collect and maintain.
- Access links to online resources useful in conducting oral histories and digitizing documents and images.
- Access example templates for documents used by the PA History Society to grow its archival collection of personal papers, photographs, videos, oral histories, and biographies.

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Section 2: The PA Historian

The Importance of a Historian:

Every PA organization/group, PA program, and PA student cohort should designate a historian or a history committee to oversee the retention and preservation of important documents, photographs, videos, oral histories, artifacts, and memorabilia related to the development and evolution of their group. Preserving history is important for:



- Creating a sense of community.
- Recording the notable events, accomplishments, milestones, and maintaining legacy.
- Building a strong relationship between constituents/members and the PA profession.
- Ensuring that there will be items to show and share at celebrations, anniversaries, and other important events.

Historian's Responsibilities:

Once a historian or a history committee is identified, the next step is to determine their responsibilities and/or priorities. Responsibilities can consist of:

- Identifying items to be collected and retained (specific documents, photographs, etc.)
- Ensuring that all relevant information that explains the origins, development and evolution of the program, organization, or PA program cohort is obtained and retained. (When collecting materials, it would be prudent to keep in mind what could be used for future displays and events, such as anniversaries, themed weeks or months, PA Week, etc.)
- Attending events or appointing a proxy to attend events to collect slide decks, programs, photographs, and other memorabilia to be saved.
- Ensuring that there is a safe, environmentally protected repository (can be as simple as a closet in the office or an official external hard drive) that contains all the items or digital copies of what has been decided upon to collect and retain (minutes of meetings, correspondence, newsletters and photographs - such as first-class photographs of educational programs or of founding members of the organization, videos and oral histories by leaders or major events, etc.)
- Creating and/or keeping current:
 - A chronological list of faculty and staff, officers and committee heads, or other leadership positions that apply from the founding of the organization to the present.
 - A chronological list of individuals who have received awards, recognitions, or honors from the program or organization's founding to the present.
- Publishing and/or keeping current on organization's website a timeline of seminal events (PA practice legislation passing, awards received, etc.) in the organization's history and a brief overall history of the organization, which will be used as a source of public information.

- Acts as the “point person” for requests from individuals for archival/historical information on the organization.
- Preparing exhibits, posters, and social media posts educating students, organizational members, and the public about institutional history for celebrations such as anniversaries, alumni gatherings, and PA Week.
- Recommending a small budget be created for archiving/preservation purposes. Funds will be needed to purchase archival-grade materials (folders and boxes), to store materials and to digitize any video or audio tapes, if required.

For PA programs with Student Historians, please see [Appendix 1](#), for the Society’s “*Student Historian Checklist*”.

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Section 3: Archiving Best Practices

Keeping Institutional Histories Preserves the Collective Memory:

An institution's memory is preserved in its records. Therefore, saving and preserving primary source materials, either in physical or digital forms, should have the utmost priority. These materials have been produced by key members of the organization over the years and within them is described the unique history and legacy of the organization. They are a valuable resource that can be used to orient future members and to inform others about the organization's origins, purpose, growth, and development. Archiving records ensures that the unique history and heritage will remain a part of the organization's collective memory.

Finding an Archival Repository for Records:

Most academic campuses have a library and archives that can help organize, process, and preserve historically significant documents. Usually, universities and organizations already have a policy in place as to where to donate records, papers and materials for their organization. It is always best practice to check with the institution to see if such policies exist and to comply with those policies. There are also private companies, (e.g. Iron Mountain), which will process and store archival records for a fee. The records will be protected environmentally and made accessible upon request.

If there is not a procedure in place for the systematic preservation and storage of archival materials, one will need to be created. It is best practice to choose a central repository (for example, a room in an office would be better instead of someone's garage) to store the physical materials that have been agreed upon to collect and preserve. Having a central location makes documents and other materials easy to find, access, have others contribute to, and pass on to the next Historian. For digital materials, an "official" external hard drive or a cloud-based storage account is recommended.

When selecting a room or space to house physical archival holdings, it is best to look for an area that is climate controlled; therefore, attics and garages are NOT ideal. Also look for a space that will have low humidity, such as an area not near windows or restrooms. Keep an eye out for possible hazards as well, such as an area with pipes which could be prone to water damage if the pipes burst, etc.

Archival best practices state that a storage area will be between 35-65 degrees Fahrenheit and below 50 percent humidity¹. A normal dehumidifier that can be bought for the household is typically sufficient in a small area, like a room or closet, to keep to archival standards. A climate-controlled storage facility is another solution to storing archival materials.

For class historians, the creation of a Facebook group or Instagram account for classmates to upload photos to or tag their own photographs is an effective way to collect archival material. Creating an email account to send photographs and other materials to is another efficient way

¹ [https://siarchives.si.edu/what-we-do/preservation/environment#:~:text=High%20relative%20humidity%20can%20encourage,percent%20relative%20humidity%20\(RH\).](https://siarchives.si.edu/what-we-do/preservation/environment#:~:text=High%20relative%20humidity%20can%20encourage,percent%20relative%20humidity%20(RH).)

to gather items. Student historians should always make sure that there is a faculty member to turn over collected materials while attending the PA program after the cohort graduates.

What Materials Should Be Archived:

Only records, items and documents that have historical value should be kept in an archive. Keep records that best illustrate the accomplishment of the organization's mission, purpose, and development. Make sure the records contain a variety of materials that can be used to better understand past decisions and directions taken by the organization. Materials that highlight accomplishments and milestones should also be saved. Documents are more useful if organized into related groups of materials (such as by date or topic) rather than individual items.

The historians and institutional stakeholders should create a Collection Development Policy if one does not already exist. A Collection Development Policy lists what sorts of documents are accepted and kept to be archived. If donating items to an archive, first check their Collection Development Policy to find which repository's mission most aligns with the collection. Almost all university archives will accept collections from programs at that university. In fact, sometimes it is mandatory to give these archives priority when donating items if the materials were made or collected in service to the program. (See "*How to create a Collection Development Policy*" in the next section).

What is Relevant, Valuable, and Historic Material:

Some examples of materials for researchers and historians of organizations, PA programs, and PA groups are provided below. It is not a complete list and will vary according to the type of organization.

Administrative Records: Articles of incorporation, charters, bylaws and policy manuals, legal documents, minutes of meetings, budgets, grants, business and strategic plans, handbooks, directories, correspondence, important email communications, memoranda, data sets, directories, class or membership rosters, or human resource files.

Personnel Administrative Records: Papers and records of key organization personnel, such as staff, officers, or faculty.

Publications: Newsletters, scholarly articles, white papers, and other publications generated by the organization (bulletins, pamphlets, brochures, fliers, etc.), press releases, and clippings.

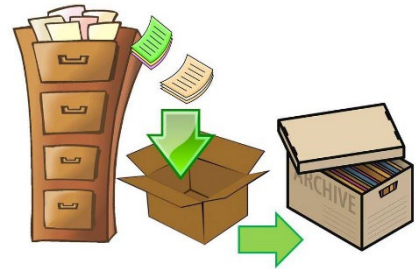
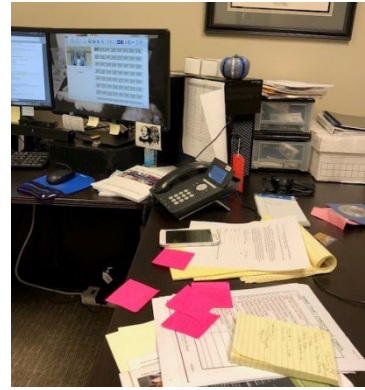
Photographs: High quality digital copies, prints, negatives, pictorials, scrapbooks. Photographs of events such as annual conferences, board meetings, committee meetings, social events, PA Week, etc.

Media: Digital copies of audio and/or video recordings, motion picture films, videotapes, DVDs, and CDs relating to people and events pertinent to the organization's history – especially oral histories.

Social Media: Website backups/Instagram/Facebook/X files – Such as photographs, hashtag conversations, outreach campaigns, etc.

For a student historian, some examples that might be of interest to collect from their cohort are:

- Photographs of:
 - Class events, such as parties, meet-ups, volunteer events, etc.
 - PA Week festivities and activities
 - Classroom activities
 - Clinical rotations (make sure there are no patients in the photos)
 - Classmates attending local, state, or national PA conferences
 - White Coat ceremonies
 - Graduation, especially class group photos
 - Special moments, either for the PA program or during the lives of the students while enrolled, such as marriages, births, etc.
- Meeting minutes for any student-led group or activity
- Articles, posters, or other publications written by or about students in the cohort.
- Written accounts or interview recordings of students with unique experiences while with the program, such as overseas volunteer trips, special distinctions, grants, awards or community outreach experiences.



When accepting donations of materials from constituents (e.g., a past president cleaned out their closet and found board meeting notes, or classmates donate their PA Week photos to the student historian), make sure that they sign a waiver stating that they turn over the rights of the materials, if they own them, to the archive/organization/historian to use as they see fit. In archiving this is called a *“Deed of Gift”* (please see an example as [Appendix 2](#)).

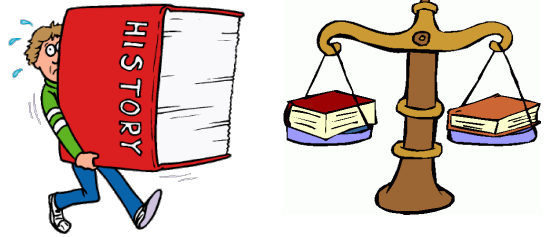
Note that digital files should have standardized, descriptive file names. For example, all newsletters might be named NLtr01.02.2015 where “NLtr” means Newsletter and the following numbers indicate the volume, issue, and year of publication. Check digital files at least once a year for accessibility and back them up regularly. Remember the acronym LOCKSS = “Lots of Copies Keep Stuff Safe”. For digital copies it is best to have files in at least three separate places, one of which is kept “offsite” in the event of fires, tornados, theft, etc.

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Section 4: Growing the Collection

Collection Development Policy

It is best practice for every organization or group interested in preserving their history to create a Collection Development Policy to guide the acquisition of materials, to determine their relevance and value, to manage their growth and maintenance, and to deselect them when found to be of little use and value. A Collection Development Policy provides the parameters for developing a coherent historical collection based on the institution's mission and goals. By defining the scope of the current collection and areas needing further development, the Collection Development Policy ensures consistency in selecting new materials, what to get rid of when materials are no longer of value, and what can be accepted to add to the collection from constituents. As a reference, a sample of an "Archive, Library and Museum Collection Development Policy" is available as **Appendix 3**.



A Collection Development Policy usually consists of the following sections but may differ depending on the relevancy to the organization's goals²:

- General purpose – gives a brief history of the institution or organization, its mission, and its purposes for collecting historical materials.
- Brief note about the collection – brief description of the current collection and future areas of interest.
- General subject boundaries – defines the scope of the collection by providing a list of subject areas and categories covered in the collection.
- Language boundaries – defines what languages are acceptable for materials being collected.
- Chronological boundaries – defines the time frame for materials being collected (for example, the founding of the organization to the present day).
- Geographical boundaries – defines the breath of the collection in terms of origin.
- Type and format of materials collected – describes the physical types of materials collected (e.g. paper, posters, artwork, digital prints, photographs, video and audio of interviews or promotional material, manuscripts, t-shirts, 3-dimensional artifacts such as lapel pins, buttons, posters, etc.) and types of materials not collected (e.g. textiles, audiotapes, negatives, etc.)
- Other resources available – relevant materials found in other repositories.
- Discarding and deselection - Establishes policy for removing unwanted items from donations and collections.

² <https://www.wisconsinhistory.org/pdfs/la/LIB-WHRAB-Records-Policy-Libraries-WAPL.pdf>

Legal Considerations:

When items are donated to the organization's historical collection, it is important to understand the steps that need to be taken to ensure the donor's rights and privacy are protected, as well as the institution's right to grant access and use of the materials for research, literary, educational and publicity purposes.

A Deed of Gift

A legal agreement between the donor and the repository that transfers ownership and legal rights of the donated materials. Typically, the document identifies the donor, describes the materials, transfers legal ownership of the materials to the repository, establishes provisions for use, specifies ownership of intellectual property rights, and indicates disposition of unwanted materials. For example, if a constituent wished to donate their photographs from previous conferences to a state chapter, they would need to fill out a deed of gift form so that the photographs could be used without needing the donor's permission each time. A sample "*Deed of Gift*" is available as [Appendix 2](#). Also, please see the [Society of American Archivist Guide to Deed of Gift](#) for more information.

Copyright and Permission to Use

This form is essential when an organization allows access by an outside source to its archival documents and other materials for use in publications or other forms of replication. Academics rely upon a provision for "fair use" found in the Copyright Act (section 107)³ which states that someone's copyright protected work can be used without express permission for purposes of criticism, comment, news reporting, teaching, scholarship, and research. Even so, the user must still consider the following:

1. Will the materials be used for nonprofit, commercial, or educational purposes?
2. What is the nature of the copyright protected work (e.g., unpublished manuscript vs. art, photography, music)?
3. To what extent will the content be used (brief excerpt vs. several pages)?
4. Will the intentional use have a negative impact on the potential market for, or value of, the copyright protected work?

In situations where the work will be republished or used for non-educational use, the best policy is to secure permission to use from the owner or creator (sometimes both) the copyright protected work. Most archives have a permission to use request policy and form to be completed. However, having an item in their collection does not always mean that the archive can grant permission to use. In this case, it is up to the researcher or prospective user to seek out permission from the rights holder (for example, the user wanted to republish an article from a journal in its entirety).

³ U.S. COPYRIGHT OFFICE, COMPENDIUM OF U.S. COPYRIGHT OFFICE PRACTICES § 101 (3d ed. 2021) §107. <https://www.copyright.gov/title17/92chap1.html#107> See also <https://www.copyright.gov/fair-use/>

An example of a “*Request for One-Time Use of Material Form*” is attached as **Appendix 4**. The form is signed by individuals requesting that the organization/institution grant them permission to use archival materials for presentations, publications, or promotional material.

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Section 5: Records Management and Retention Guidelines

Most organizations will already have a records management plan in place. In that case, the historian's duty is to only suggest that the retention guidelines include what sorts of materials should be sent to the archives for historical preservation. If a records management system is not in place and the historian has the authority to do so, it is strongly encouraged to create or appoint others in the creation of one for their organization.



Records management⁴ is the attempt to systematically control the growth and disposition (destroy or archive) of office, committee, and other official records. Its basic purpose is to define what to keep, for how long, and when to remove it from the current office-based files. Ideally, every organization will already have an active and up-to-date records retention schedule that it adheres to, which makes it easy for an archivist/historian to capture significant documents as soon as they are no longer needed by the department. Make sure that the institution's records retention policy mentions which records need to be stored for archival purposes, who those records are given to (historian, archivist, or department) and when those records are turned over. If there is no records retention policy at the institution, it might be up to the historian to recommend creating one. An example of a "*Records Retention Schedule*" is available as **Appendix 5**.

The following provides a template that would be helpful in starting a conversation about records management and archival preservation.

Rationale: It is important to manage office records so they are readily available to conduct daily activity; can be removed and disposed of when no longer needed; and can be preserved to document the past and guide the future. There are several reasons to have a records management and retention system:

1. Preservation of important historical records
2. Effective use of space and time
3. Legal protection

Responsibility: Many academic institutions and organizations already have developed a record retention policy. Check to see if such a policy exists. If not, then it may be the historian's responsibility to implement, evaluate and amend the guidelines set forth in this document for the organization or academic program.

Vital Records: These are the records necessary for basic organizational operations which if destroyed would make it difficult for the organization to continue to operate or would be necessary for getting the organization back into full operation. Some are required for legal purposes (financial, personnel, tax records, deeds & contracts), while others are important to the daily life of the organization and to its history (archives).

Electronic Record Issues: The management of electronic records primarily involves word

⁴ <https://www2.archivists.org/node/14803>

processing documents, digital photographs, slide shows and data management systems. There is a large variety and versions of software available on the market that manage electronic records. The use of electronically stored data is dependent upon software (both operating systems and software programs) and hardware used. The medium upon which electronic data is stored is also undergoing rapid change (hard drives, floppy disks, zip drives, memory sticks). The most “secure” way to preserve most electronic documents is to print the document out on paper. The document can then easily be managed under records management and retention guidelines.

Printing out digital items and then finding space to store them is a herculean task. Electronic storage of data is much more efficient and space saving. When using and storing electronic records (data) remember:

1. Move data when operating systems, hardware and software are changed, replaced, or upgraded (this can be time consuming but necessary if data is to be retrieved in the future). This also includes storage of photos and videos.
2. Organizing and storing computer files on hard disk or backup disk should correspond with the same retention guidelines provided by your organization.
3. Making backups (stored offsite) of vital records is one of the most important tasks to be done.

Storage of Records: Current records and those needed for everyday operation should remain on-site in the organization’s administrative office. Originals should be kept separate from records in daily use in a secure and accessible area. Historical documents should be stored in environmentally safe conditions either off-site or in an area separate from the files that are still active.

Destruction of Records: Any record to be destroyed that contains personal information, financial information and any other information deemed private should be thoroughly destroyed by shredding when permanently removed from the office. Old credit cards and CDs containing sensitive information should be shredded as well. Large quantities of materials to be destroyed by shredding might best be managed by an organization that pulps (fine shreds) paper and other materials professionally.

Shipping Records: Materials to be maintained off-site in either regular storage or in an archival environment must be shipped according to best practice standards. The type of storage boxes to be used, preparation for transport, means of transportation, and inventory list for retrieval purposes should follow written policy agreed upon by the organization and the vendor providing these services.

Success of Record Management and Retention System: The ability to effectively manage records and assure their proper disposition will depend upon the cooperation of others in addition to the records keeper’s own oversight.

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Section 6: Conducting Oral History Interviews

While institutional policies and other administrative records provide the “official” documentation of organizations and departments, recorded interviews can provide individual and sometimes more useful contextual evidence of activities. These also often give a voice to groups not traditionally documented in the archival record and who may have been excluded in the past. All interviews should be conducted with a prepared set of questions to be asked by the interviewer. The subject of the interview should be allowed to review the questions in advance, so they are prepared for the discussion.



In this modern age of video calls, it is easy to record interviews from the comfort of one’s home or office. To attain the best quality for a video recorded oral history, filming in person with a high-quality camera is still the best method.

Basic Interview Tips⁵:

Preparation: Narrow the focus of the interview to one or two topics; then do background research to generate a list of questions beforehand. This will help keep everyone on track during the interview. Ask open-ended questions which are brief and to the point; begin with more general questions building up to more specific questions about the subject matter. Contact the interviewee and explain the topic that will be discussed and how the interview will be conducted, either in person, over video call or by phone. Let the interviewee know the plan to record the session as either audio only or video. Explain to the interviewee how long the interview is expected to last, how the interview will be transcribed and edited, and the necessity of having the interviewee sign a release form so that the interview can be used for research, literary or educational purposes. Arrange a time and place to hold the interview that is convenient and suitable for the interviewee and when they will be undisturbed by others. Make sure to do “trial runs” of the equipment beforehand to make sure the recorder understands how it works and that it is functioning properly. If conducting the interview through video conferencing software, make sure the software is up to date before the call. It is advisable to arrange a practice time with the interviewee to make sure they can log in to the conferencing meeting software with no trouble.

Conducting the Interview: Before starting the interview, check to make sure the recording equipment is working properly. Briefly describe the intent of the interview and ask if the interviewee has any questions. Start the recording by stating the names of the interviewer, interviewee and date and location of the interview. Let the interviewee know that they can stop

⁵ <https://siarchives.si.edu/history/how-do-oral-history>

the recording when necessary to check notes, recall information or take rest breaks. When asking questions, stay focused on the topic but be open to expanding the discussion to gather more detailed information. If the interviewee begins to get off topic, politely interrupt and ask a question to get back on track. Jotting down notes is acceptable but remember to pay attention to the interviewee. Do not interject personal thoughts and opinions into the discussion; the interviewee should do the bulk of the talking. Try to keep the interview to an hour or less to not exhaust the interviewee. Thank the interviewee for their time and explain the timeline for editing the interview and sending it to them for review. Take a photograph of the interviewee or have the interviewee send a recent photograph to be included in the oral history folder for illustrative purposes.

Afterward: It is always best practice to transcribe audio-only interviews. There are programs and companies that can do this, but additional costs may be incurred. Check spelling of names and places mentioned in the interview. Next, edit the transcript for clarity (split sentences, tense, grammar, etc.) without altering meaning - leaving narrative as much as possible in words used by the interviewee. Leave comments in the margins asking interviewee for clarification or more information about statements that need more explanation. Send the edited transcript to the interviewee for final review and edits. Be sure that the interview is presented as accurately as possible. Once completed, add the edited transcript to the oral history collection and send a thank you note to the person interviewed.

For video recorded oral histories, it is recommended to add captions or subtitles to make the video more accessible to others. This can also be done with video editing software such as Adobe Premiere or through video sharing sites like YouTube or Vimeo. If the software or video sharing sites automatically caption videos, it is still necessary to check the captions and edit errors such as misspellings of names or misuse of words.

After the interview is edited, send a copy to the interviewee for feedback and approval. Send a permission form for the individual(s) to sign after the edited interview is approved.

Alternative Types of Interview Sessions:

In addition to the traditional one-on-one oral history interview, it is possible to conduct interviews with two or more people at the same time. Multiple person interviews are helpful in gathering a broader perspective of the topic under consideration and may help interviewees recall more detailed information as they listen to others. For audio-only interview transcription, it is important to be able to identify the individual voices of the interviewees. Consequently, the interviewer should use the name of the person they are addressing when asking a question or asking for other opinions about a statement just made. For video recording captions/subtitles, always include the name of the speaker each time a different person speaks.

Audio or video recording of a panel discussion is an effective way to collect memories of key leaders of an organization. Be sure that a microphone is available to record questions that might be asked by members of the audience. If video recording, use multiple cameras, if possible, to enhance editing by providing close-up and distant views of the panel and audience. Pay close

attention to sound and lighting. The participants will need to sign release forms to allow the recording to be used and stored.

An example of a *Permission to Use Form* for oral histories is available as [Appendix 6](#), a set of “*Sample Oral History Interview Questions*” as [Appendix 7](#), and “*Tips for Long Distance Oral History Interviews*” as [Appendix 8](#).

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Section 7: Short Biographies

Short biographies or biographical sketches capture the stories of leaders and other prominent people in the institute, PA program, PA class, etc. If the organization has a board, make it mandatory to have a biography for each former and current president/chair. For PA programs, do the same for the founder and each program director. This is a wonderful way for student historians to work with the alumni association of their school to build connections and assure the history of notable graduates is captured.



Biographies can be displayed on the organization's website, in newsletters, or both. Some state chapters have a list of their past presidents with links to each president's short bio so that constituents can read and learn more about them. For alumni of PA programs, it can be used to inspire students and show ways that graduates are making an impact as a PA in healthcare.

A short biography is typically 750-1,000 words in length. The first step is to request either a resume or CV, or email a questionnaire for the subject to complete, to be used as a reference to draft the biography. See [Appendix 9](#) for a sample "*Biographical Sketch Form*". Also request photographs to accompany the biography. The Society recommends that one of the photographs requested be a current headshot.

If the person is deceased, consider contacting their next of kin and working with them to craft the biography. If that is not an option, use other sources such as articles, etc. Make sure to include the references used in the final biography.

To see examples of written short biographies, go to the [PA History Society Biography page](#). The general template for written biographies is available on the next page.

Template for Written Biographies

First Paragraph - Introduction: In the opening paragraph, describe one or more of the contributions that the subject made to the institution and/or to the PA profession. This paragraph should provide a summation of the individual's career highlights.

Second Paragraph – Early Years: This paragraph should contain details of subject's early years-- where they were born and raised, where they attended school, education, what drew them to the PA profession/medicine, if applicable.

Third Paragraph - Early Profession: Use this paragraph to describe their early career. Provide details of their early accomplishments, and early involvement in the institution or the PA profession.

Fourth Paragraph - Main Body: The remaining body of the biography should contain career accomplishments, awards, and organizations in which they served. This section can also be used for their contributions to the institution, the profession, and their community.

Last - Current Status: The last paragraph should contain their current position and focus. Add personal details, such as hobbies, family, interests, etc.

Acknowledgements: Prepare acknowledgements for those who wrote the bio, who assisted in its creation, the source of photographs used (if any were used), references, and date completed. Once the biography is completed and proofread, send it to the individual or their next of kin, if available, for final approval. It is recommended to send the individual or a representative for that individual a permission form so there is proof of their consent and the accuracy of the statements in the bio. For an example of a "*Biographical & Photographic Permission Form*", please see [Appendix 10](#).

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Section 8: Digital Archiving

In a world that now produces most of their documentation, photographs, and correspondence in digital format, it is more important than ever to make sure that these historically significant items are not only preserved, but also properly stored. Storage for electronic media may seem simple because the volume that can be saved is not dependent on the capacity of a physical space, but it does produce unique considerations.



The first task is to decide upon a central location to ultimately store electronic archival content. Much is lost each year due to items stored on USB drives or other storage devices being misplaced or the person who was storing the items leaves a job position and there being no policy on what should happen to that person's stored content. The solution can be as simple as having an external hard drive dedicated as the "archive" where material designated for archival storage is saved or a cloud storage service.

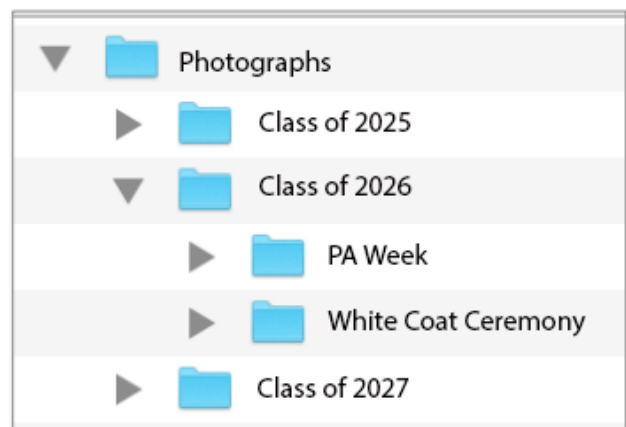
Once it is decided where material will be stored, make sure that there is a systematic way for everyone to know what kind of digital material is to be placed, or uploaded, into the archives. The date the material is received and by whom should also be recorded. The easiest way to do this for an organization or PA program is to write it into the records retention policy. For PA class historians, always make sure that there is a point person for classmates to turn in their photographs and other materials to and that there is an appointed faculty member who will be responsible for it after the class historian graduates.

Organization Systems:

Once a person is designated responsible for the intake of materials, a secure place to store digital materials is established and a clear definition of what will be saved is outlined, the need for a system of sorting the material will be apparent. Without a system, there would be no way to find anything efficiently! Treat digital material just as one would their physical counterparts and sort it in a physical filing cabinet.

Think of filing (either digitally or physically) as a hierarchical system. There is the main heading (for example: Photographs). Then a subheading (for example: Class of 2026). It can then be broken down further into sub-subheadings ("PA Week Activities" and "White Coat Ceremony").

Do not create an excessive number of folders within folders containing more folders. There is a limit to the computer will tolerate. If there are too many folders that are nested within each other, a "pathway too long" error



message will appear. If more specification is necessary at the sub sub-level, consider creating another subcategory.

Make sure that duplicates are not being kept. For photographs, one copy of the best quality image should be kept; delete subpar photographs. For digital documents, keep one master finalized copy and/or request that during intake that is the copy that is submitted to be archived and all other versions deleted (e.g., keep a copy of the *approved* meeting minutes. Drafts and revisions can be deleted and not stored.)

The Naming of Things:

It is important to establish a uniform and consistent file naming convention early in the archiving process. The file name should be as descriptive as possible to make it easier to locate. For example, “2011_06_11 BOT Meeting Minutes” → Board of Trustees Meeting Minutes November 11, 2011. The next item would then be “2012_11_18 BOT Meeting Minutes”, and so on. Try to keep file names to 32 characters or less and avoid special characters like & , * ! @ (), etc. (Underscores are fine, ex: __) If listing dates in a file name, use the format YYYY_MM_DD as this will sort the files in chronological order.

It is a good idea to include a README file in the digital archive that explains naming conventions, especially any abbreviations that may be used. Ex: Ntrl → Newsletter. A README file should also be included with any photograph collections to provide more information (or metadata) of who is in the photograph, the location, the event, etc.

File Formats:

All files saved in the digital archive should be non-proprietary. Non-proprietary in this case means a file should be able to be opened and read without the need of buying or owning a special program that is the only option for reading the file. Non-proprietary files should be able to be opened by multiple programs, some of which are free for the public to use. Predicting the longevity of software is impossible. Avoid saving files in a format that might not be able to be opened ten years later or can only be read at great monetary cost. For this reason, archival standards recommend saving files in PDF/A format versus Word Docx format. (PDFs can be saved in a format that can be locked and not changed.)

Below is a list of non-proprietary file formats that are preferred for archival purposes⁶:

- Images: TIFF, JPEG, PDF, PNG, GIF, BMP
- Text: PDF/A, TXT, RTF
- Presentation Slide Shows: PDF, PPTX, PPT
- Audio: WAV, MP3, AIFF
- Databases/Spreadsheets: CSV, TXT, ODS, XLS
- Video: MOV, MPEG, AVI
- Websites: HTML, WARC

⁶ <https://libguides.lib.umt.edu/c.php?g=712064&p=5066906>

Saving Digital Correspondence AKA Email:

It used to be easy to look through written correspondence to decide what to keep and what to toss. In the modern age with most of the communication being done through email, it might seem that saving archival relevant correspondence is impossible. This is why it's important to have written into your records retention policy what types of correspondence can immediately be put in the trash bin (that reminder about the company 5k) and what needs to be kept and turned over to the designated historian/archivist (a conversation about developing new legislation).

The simplest format to save an email in is as a PDF. Not only does it simplify the process, but it is also the format with the most longevity. To turn an email into a PDF, pretend to print it. When the popup window asks which printer to send it to, choose to "print" as an Adobe PDF file. Please note that if an email has a relevant attachment, the attachment will need to be saved separately⁷.

Lots of Copies Keep Stuff Safe (LOCKSS)⁸:

There should not be multiple versions or copies of archival files stored in a single archive, true, but the entire archive should not be stored in a single place. Archives, history societies, and companies have been in the news throughout the years due to disasters wiping out their entire digital repositories (the most famous being how Toy Story 2 almost got completely erased⁹). If an archive is stored entirely in a single external hard drive and then that hard drive is stolen or the building it was stored in catches fire that data is lost forever. Not even cloud-based storage is safe as even something stored in "the ether" needs a physical server that is susceptible to lightning strikes frying circuits or hungry raccoons eating wires.

This is where the archival maxim LOCKSS comes into play; *Lots of Copies Keep Stuff Safe*. It is best practices for digital archives to be routinely copied in at least three different "locations," one of which being off-site. The PA History Society, for instance, has the "main" digital archive on an external hard drive that quarterly, or as needed, is backed up on another external hard drive and to a cloud-based storage system. The backup external hard drive is stored off-site from our main offices. Therefore, if anything were to happen to the office building, there would be two full copies of our digital repository still in existence¹⁰.

Digitizing Physical Records and Other Memorabilia:

Digital preservation provides the ability to easier store, retrieve, and display important historical institutional records by taking advantage of modern technologies. The decision to implement a digitalization project should be carefully considered. Depending on the bulk of the records and media, the process of digitization can be costly both in time and money. Consider if the cost of

⁷ <https://www2.archivists.org/prof-education/course-catalog/email-archiving-strategies-tools-techniques>

⁸ <https://dictionary.archivists.org/entry/lots-of-copies-keep-stuff.html>

⁹ <https://www.independent.co.uk/arts-entertainment/films/news/lightyear-toy-story-2-deleted-b2017238.html>

¹⁰ <https://www.dpconline.org/handbook/organisational-activities/storage>

digital preservation is worth it; if it will enhance the mission and be beneficial to constituents (end-users); and if it fits into the institution's long-term records management plan.

Given the large amount of resources required (scanner, staff, etc.), it may be more cost effective to contract the services of a vendor specializing in digital preservation. Academic institutions or those affiliated with them should contact the university library and/or archives to determine if the vendor will take responsibility for the digital preservation project. Ideally, they will have the resources to complete the project and provide access to the digital collection.

A Simple Approach to Digitization:

One benefit of storing information digitally is that it will ensure that there is a replica of the original document (photograph, manuscript, etc.) in case the original is lost or damaged. Over time, the digitally preserved image files will need to be maintained in a secure system, backed-up and migrated to new technologies as necessary. In addition, a catalog record for each image file will need to be created that includes a title and description of the image along with other relevant information. Remember LOCKSS (Lots of Copies Keep Stuff Safe). It is the recommended practice to have materials stored in three separate places, one of which is "off-site."

Digital Terminology:

Bit: The smallest unit of computing information.

Bit depth (1-bit, 8-bit, 24-bit): The amount of information (black and white or color) a computer can discern for each bit of an image. 1-bit is black and white (off or on), 8-bit is 256 "shades", "values" or "levels" of gray or 256 colors, 24-bit is millions of colors.

DPI - Dots Per Inch: A unit of measure used to describe the resolution of images produced by printers, scanners, or other output devices. Generally, more dots per inch means a higher resolution, a greater amount of visible detail in the image, and a larger file size.

File format: The specific way digital information is made and stored by the computer. Not all software applications can read and/or manipulate all file formats.

- TIFF (Tagged Image File Format) - A type of graphic file format developed for scanning. TIFFs are bitmapped graphics that contain lots of information about each bit and are the format suggested for creating master files of digitized images. Because TIFFs save a lot of information about each pixel, they can be very large files. TIFF files are necessary for high resolution printing such as large posters or producing HD video recordings.
- JPEG or JPG (Joint Photographic Experts Group) - A graphic file format that compresses information about many colors (up to 16 million) in the image into a smaller file. JPEG/JPG files are used as "working files" – to be used for print or computer screen presentations.
- ppi (pixels per inch) - Measure of resolution for a monitor.

Resolution: An expression of image size; the sharpness and clarity of an image, achieved by the closeness of the dots that make up the image. Resolution is expressed for the scanner as

samples per inch (spi), for the screen as pixels per inch (ppi), for the printer as dots per inch (dpi). Images having more data per inch (samples, pixels, dots) will have higher resolution. Higher resolution image files are much larger than low resolution image files but are recommended for archiving purposes, especially if the image will be printed in a paper publication or any part of the image is enlarged.

Capturing Devices¹¹:

Scanner: For archiving, a scanner should allow for 8-bit and 24-bit depth capture with 300 to 4,800 dpi resolution and output to TIFF and JPG files. (For digital archiving, the recommended format is a TIFF file of at least 600 ppi for photographs and 300 ppi for documents.) Flatbed scanners are best for digitization work. Never use the automatic feed scanning function. If the materials are fragile or overly large, it would be best to take the photograph with a digital camera.

Digital Camera: The resolution for a good, archival digital camera should be 10-megapixels or above. A 10-megapixel camera can produce acceptable prints of up to 13 by 19 inches, though they may lose some detail. Images from a 13-megapixel camera look good at 13 by 19 inches and can be pushed to 16 by 24 inches. Also, look for a camera that can capture photographs in TIFF format. JPG will save space, but TIFF will give the most detail. *Be mindful that using flash photography may damage older, more sensitive documents. Look for a camera that has a larger lens; a camera that has a good low-light performance is recommended if the flash function cannot be used.

Simple Guide to Digitizing Materials

Because the size and quality of materials to be scanned can vary, it is difficult to provide specifications that will ensure the best image to be stored electronically. Therefore, scanning a document or photograph that is the size of a postcard may require a higher resolution than an 8.5 x 11-inch letter or 8 x 10-inch photograph.

The following table provides a suggested specification for imaging various types of materials¹².

	Printed Letter B&W	Bound Manuscript B&W	Bound Manuscript Color	Photographs Color	35 mm Slides Color
Suggested Digitization Specs	300 dpi 8-bit B&W	300 dpi 8-bit B&W	400 dpi 24-bit Color	600-1200 dpi 24-bit Color	3000 dpi 24 bit Color

Case Study:

¹¹ <https://www.archives.gov/files/preservation/technical/guidelines.pdf>

¹² <https://www.digitizationguidelines.gov/>

The Society's first digitization project was a joint venture with the Duke University Medical Center (DUMC) Library and Archives to image documents from within its extensive collections pertinent to the inception and development of the physician assistant concept, especially in its formative years from 1965 to 1975. This project was supported with Federal Library Services and Technology Act (LSTA) funds made possible through a grant from the Institute of Museum and Library Services, administered by the State Library of North Carolina, a division of the Department of Cultural Resources. The project was completed in 2003. The DUMC archive is the repository for this digital collection which contains over 3,000 images selected from materials contained in the DUMC Archives. Browse the MEDSpace© software by clicking on the following link: [DUMC Archive MEDSpace Digital Repository](#)

In 2008, the Society purchased PastPerfect™ Software and began cataloging items found in our Archive, Library and Museum Collections. This was made possible with funding from the Duke Endowment, Carnegie Corporation of New York, Robert Wood Johnson Foundation, and private donors. Browse the Society's digital image collection by using our [PastPerfect™ Online Database](#) and selecting the random image search in the top menu bar.

NOTES:

Section 9: Social Media

Utilizing social media is a great way to engage with the organization’s community and to foster buy-in to the importance of preserving history. Think of ways to foster excitement and interest in both the history of the organization and history in the making. Plan digital events such as honoring observation months (Black History Month, Women’s History Month, Pride Month, etc.) by highlighting photographs, biographies, or oral history interviews in the collection. If there is a gap in the collection and no appropriate materials exist currently, ask constituents to become involved by donating photographs and recommending PAs to be interviewed for biographies or oral histories. PA Week and institutional anniversaries are also a great time to employ historical collection items.



Common Social Media Sites:

Facebook: The most popular social media platform. Tips on posting to Facebook are¹³:

- Content that contains photographs and videos shown to a wider audience (this also includes followers of the page/group).
- Posts that are interacted with (liked, shared, commented on, etc.) also get shown to more users. Encourage users and followers to engage with content by inviting them to comment on posts.
- Shorter posts get more views. 120 characters or less is recommended.
- Consistent posting helps the algorithm show content to a wider audience. Posting once a week is enough to successfully “feed the algorithm”.
- Posting too much (more than 4 times a day) or repeating content (copying and pasting the same posts) will be considered “spamming” and will either cut down the number of followers the posts are shown to or flag the account.

YouTube: Is the second most popular social media platform. Used for posting longer videos (five minutes or more). Videos can be made, and links shared through other social media sites. YouTube also has a nonprofit program that allows for some free perks.

Instagram: The demographic for Instagram is ages 18-24, with the age bracket 25-34 a close second¹⁴. The platform is good for sharing photos and short videos. Videos can be shared either as posts, Stories, or Reels. Stories are short videos lasting 15 seconds meant to show “candid”, spur-of-the-moment events. Stories will disappear after 24 hours. They are the most viewed format for videos on Instagram. Reel videos can be up to 90 seconds and are permanently stored on the account unless deleted. They are expected to have a more “polished” look than Stories. Both Stories and Reels have better viewer response than posted videos¹⁵. Instagram also allows for live feed video. Tips on posting to Instagram¹⁶:

¹³ <https://education.hootsuite.com/pages/best-practices-for-sharing-content-on-facebook>

¹⁴ <https://thesocialshepherd.com/blog/instagram-statistics#:~:text=Most%20of%20its%20Users%20Are,making%20up%2016.4%25%20of%20users.>

¹⁵ <https://www.socialpilot.co/blog/instagram-reels-vs-story>

¹⁶ <https://www.socialpilot.co/instagram-marketing/instagram-for-business-best-practices>

- Post consistently, at least 1-2 times per week.
- Make use of hashtags to increase both engagement and discoverability.
- Make use of the tagging option in post to tag locations, events, and other users' Instagram accounts. Again, this increases discoverability.
- Taking and posting high quality photographs and videos is important.
- Make use of both Reels and Stories to engage users.
- The use of emojis in Instagram posts leads to higher engagement.
- Add close captioning to video.
- Instagram only allows **one** link on your profile page (also called bio page), which is intended to go to your organization's homepage.

TikTok: A platform that is for short video sharing only. Video is capped at 15 to 60 seconds and is filmed via mobile devices or webcams. The main demographic for TikTok is women 18-24 years of age. It makes use of hashtags like most social media platforms. It is recommended to post on TikTok 1-4 times per day, which is not feasible for most organizations without a dedicated social media agent or department.

Snapchat: Photos and short videos only. Photos and videos can only be viewed by followers once and then they are erased. Often used for "silly" posts targeted at teenagers and those in their early 20s.

*X (Formerly Twitter)*¹⁷: X is the 14th most popular social media platform. Most X users are under the age of 35 and male. Tips on posting to X are¹⁸:

- The more posts (or Tweets) the better! It is recommended to tweet daily to help X's algorithm share the posts with a wider audience. 2-3 times a week is also acceptable.
- Text needs to be short as there is a character limit with "tweets". There is a paid membership option that will allow for more characters to be used.
- Tweets that contain photographs, short videos or GIFs have more viewers.
- Use hashtags (ex. #ThrowbackThursdays) to engage users and catch interest.

NOTES:

¹⁷ <https://explodingtopics.com/blog/x-user-stats>

¹⁸ <https://social.oregonstate.edu/x-formerly-twitter-best-practices>

Section 10: Helpful Links and Resources

Archival Best Practices

National Archives Introduction to Archival Terminology:

<https://www.archives.gov/research/alic/reference/archives-resources/terminology.html>

National Archives Preservation Resources: <https://www.archives.gov/preservation>

Northeast Document Conservation Center Preservation Leaflets: <https://www.nedcc.org/free-resources/preservation-leaflets/overview>

Society of American Archivists: <https://www2.archivists.org/>

Society of American Archivist Publications at <http://www2.archivists.org/publications>

Growing the Collection

U.S. Copyright Office's online guide at: <http://copyright.gov/circs/circ01.pdf>

Oral History Interviews

Baylor University Oral History Resources: <https://library.web.baylor.edu/visit/institute-oral-history/resources>

Smithsonian Institution Archives How to Do Oral History: <https://siarchives.si.edu/history/how-do-oral-history>

Vermont Folklife Center's Recording Interviews Remotely: <https://www.vtfolklife.org/remote-recording>

Choosing the Right Equipment by the Oral History Society: <https://ohda.matrix.msu.edu/2012/06/video-equipment/>

Oral History Interview Questions Worksheet at: <http://parkcityhistory.org/wp-content/uploads/2010/12/Oral-History-Lesson-Handouts.pdf>

Oral History Association: <http://www.oralhistory.org/>

Digital Archiving

Why Don't Archivists Digitize Everything by Region of Peel Archives (2017): <https://peelarchivesblog.com/2017/05/31/why-dont-archivists-digitize-everything/>

Why Don't Archivists Digitise Everything by University of Westminster (2023): <https://libguides.westminster.ac.uk/c.php?g=681142&p=4858873>

Technical Standards for Digital Conversion of Text and Graphic Materials by the Library of Congress: <https://memory.loc.gov/ammem/about/techStandards.pdf>

13 Rules for File Naming Conventions by the University of Edinburgh:

<https://www.ed.ac.uk/records-management/guidance/records/practical-guidance/naming-conventions>

Library of Congress Recommended Formats Statement:

<https://www.loc.gov/preservation/resources/rfs/TOC.html>

Sustainability of Digital Formats by the Library of Congress:

<https://www.loc.gov/preservation/digital/formats/index.shtml>

UC MERCED Library File and Folder Organization: <https://library.ucmerced.edu/node/66751>

NOTES:

Appendix 1: Student Historian Checklist

PA HISTORY SOCIETY STUDENT HISTORIAN CHECKLIST

WHY IS HAVING A CLASS HISTORIAN IMPORTANT?

- - Helps to give a sense of community to your graduating class.
 - Records the important events, accomplishments, and milestones of not only your class, but the legacy of the PA program.
 - Builds a stronger relationship with the faculty and alumni associations.
 - You'll have great things to show and share at reunions and your programs big anniversary celebrations!
-

WHAT IS THE ROLE OF A CLASS HISTORIAN?

Class historians oversee making sure their graduating class's journey is documented through photographs, articles, record of milestones, and recording class activities.

BELOW ARE SOME TIPS TO HELP YOU WITH YOUR CLASS HISTORIAN DUTIES!

- Find out which faculty member is the historian advisor or, if there isn't one, ask for a faculty member to be a historian advisor.
 - As students graduate, the faculty will be the constant thread from graduating class to graduating class.
 - Make sure to turn in all the photographs, stories, articles, and write ups you've gathered to your historian advisor before you graduate to ensure that it can join the greater history of your PA program!
- Not only attend class events to take photos, but make sure everyone in your class has either your contact info or a digital repository (such as a class Facebook group) to submit photographs. Events to take pictures of:
 - Class Events – parties, meet-ups, etc.
 - Class Volunteer Activities
 - PA Week Festivities and Activities Students during their classes
 - Students during clinicals (make sure there are no patients in the photos!)
 - Photos of classmates attending local, state, or national PA conferences
 - Photos of the White Coat Ceremony

- Photos of graduation, especially a group class photo
- Special moments either for the PA program while your class is there or during the lives of the students while they are attending the program, marriages, births, etc.

Make sure to either take notes or collect:

- Meeting minutes for any student-led group or activity
- Articles written by or about students in the graduating class
- Written accounts or interview recordings of students with unique experiences while with the program, such as overseas volunteer trips, being awarded special distinctions, being awarded grants, or starting community outreach experiences.

DON'T JUST HOARD THE PHOTOGRAPHS AND AMAZING THINGS YOU AND YOUR CLASSMATES ARE ACCOMPLISHING DURING YOUR PA SCHOOL DAYS! SHARE THEM BY:

- Starting a graduating class social media site or group on Facebook or Instagram, etc.
- Ask the moderator of the PA program or school's social media accounts to let you submit photographs and shout-out accomplishments and milestones.
- Consider creating a monthly/quarterly newsletter to send out to your classmates and faculty with a few photographs and remarkable activities that have happened that month.

FUN ACTIVITIES THAT WILL ALSO HELP CAPTURE YOUR HISTORY!

- Oral history interview recordings (students can share stories about their experiences during PA school; why they chose to become a PA, etc.)
- Biographies or articles on individuals in your graduating class featuring their accomplishments. You may even want to consider having others in your class interview faculty or other mentors and write up their biographies.
- Create a virtual scrapbook (Shutterfly, website page, blog, etc.)

HAVE QUESTIONS? ASK THE PA HISTORY SOCIETY ARCHIVIST!

Michelle Schabowski, MSIS, CA

michelles@nccpa.net

Appendix 2: Example - Deed of Gift Agreement

In consideration of mutual benefits, _____, hereinafter called DONOR, and the Society for the Preservation of Physician Assistant History (SPPAHx) and its agents, hereinafter called the Society, enter into this agreement for access, use, disposition, and ownership of the DONOR'S PAPERS, later called PAPERS. PAPERS include such materials as correspondence, documents, diaries, thesis, photographs, audio-visual materials, digital images, press clippings, artifact and printed reports, journals, and articles solely owned by DONOR. Papers may also include reproductions, i.e., digital images, of materials that remain in the possession of the Donor.

- I. The Society shall have ownership of PAPERS upon receipt, store PAPERS according to accepted archival standards, catalog them, and prepare finding aids to assure ease of access to PAPERS. The Society has the right to transfer ownership of its PAPERS to another party if deemed necessary in the future. The gift of these materials involves physical property rights only. Copyrights and rights of reproduction in and to these materials will be governed by United States copyright law. **Unless otherwise agreed in writing by the DONOR and ARCHIVES, this Agreement shall govern all future gifts made by the DONOR to ARCHIVES.**
- II. The gift described below, which has no monetary value, is given to the Society or its agents to become part of a Special Collection on the Cultural History of the Physician Assistant Profession.

DESCRIPTION OF PAPERS

III.

At the time of their presentation to the Society, DONOR will designate all boxes or folders of PAPERS as either Unrestricted or Restricted.

A. UNRESTRICTED PAPERS:

1. All PAPERS not specifically designated Restricted, shall be Unrestricted. It is specifically understood that news releases, speeches, newspaper clippings, photographs, commonly available publications, and like materials of a public nature in the donated property are Unrestricted, even if found in boxes designated by DONOR as Restricted.

2. At time of receipt DONOR transfers both property rights and all copyrights he/she may own in Unrestricted PAPERS to the Society. The Society will permit free public access to, quotation from, and publication of these unrestricted PAPERS.

3. The Donor grants to the Society the right to image, display and provide access to his or her Unrestricted papers in whole or in part in all forms of media including the Internet.

Donor Initials

B. RESTRICTED PAPERS:

1. DONOR hereby reserves any copyrights he/she possesses in and the right to control access to Restricted PAPERS which have been turned over to the Society by DONOR and which by their year date are less than ___ years old provided, however, that the Society shall have access to PAPERS at all times solely for the purposes of listing, cataloging, storing, and preserving them.

2. DONOR reserves to him/herself the right of access to and use of Restricted PAPERS. Except as noted in paragraph II.B.1., The Society shall only allow access to and use of Restricted PAPERS by other persons approved in writing by DONOR. Persons granted such access by DONOR may quote or publish from the PAPERS under the fair use provision of the copyright law, provided that they shall signify understanding of and due regard for legal and ethical considerations including matters of copyright, invasion of privacy, libel, slander, and accurate attribution of sources. For quotation or publication beyond the fair use provision of the copyright law, written approval of DONOR or his/her designee must be secured by said persons prior to such quotation or publication.

3. DONOR may, during his/her lifetime, name one or more persons who shall have the unrestricted right of access to and use of Restricted PAPERS and shall keep the Society advised at all times of the name(s) of said person(s).

4. Restrictions as specified in Sections II. B. concerning use of said PAPERS shall cease for all PAPERS which by their year dates are more than ___ years old—or, regardless of the age of the PAPERS, upon the death of DONOR— the Society shall acquire all rights (including all copyrights owned by DONOR, and the right to control access) in and to the same. Moreover, DONOR may at any time authorize earlier free public access to any or all of restricted PAPERS as DONOR shall in his/her judgment deem appropriate. Once restrictions lapse, DONOR, his/her heirs and assigns, shall have no further legal interest therein nor right to control their disposition or use.

5. DONOR shall save the Society and hold it harmless from liability from any use of the Restricted

PAPERS, or any quotation or publication based on them, without written permission of DONOR, if the Society has followed procedures established according to this agreement.

Donor Initials (only if restrictions apply)

IV.

Materials NOT RETAINED by the Society

The Society may dispose of any PAPERS not selected for permanent retention.

Or

If the Society chooses not to permanently retain some of the PAPERS which it accepts, then it shall offer to return such PAPERS to DONOR; however, if DONOR does not respond to accept such PAPERS within 90 days of their being tendered to it, the Society may dispose of them.

V.

Materials containing protected health information (PHI) as defined by the Health Insurance Portability and Accountability Act of 1996 (HIPAA) are not made available for public inspection. Accordingly, the Society will dispose of such materials as designated by DONOR in section IV.

VI.

This agreement shall be binding upon and ensure to the benefit of the heirs, assigns, and legatees of the parties hereto.

Managing Director/ PA History Society Archivist

Date

Donor

Date

Appendix 3: Example - Archive, Library, and Museum Collection Development Policy

Introduction, History and General Purpose

The Society was established in 2002 to ensure that primary source material documenting the physician assistant profession would be preserved and made accessible to scholars and future generations of physician assistants. To accomplish its mission, the Society developed strategies: (1) to advise organizations, institutions and individuals how they may best safeguard the record of their achievements using standard archival methods; (2) to conduct and collect oral histories documenting the growth and development of the PA profession over time; (3) to collect and present biographical information that honors those who have contributed to the PA profession's success; (4) to identify and process institutional and organizational records and personal papers and selected archival, library and museum items that are unpublished, inaccessible or in danger of being lost unless the Society intervenes to ensure the survival of these unique and priceless collections. As an adjunct to other repositories, the Society's Archive, Library and Museum (ALM) Collection contains valuable primary source material useful to scholars, learners, and policymakers.

From 2002 to 2011, the Society's noncurrent administrative records and special ALM collection were maintained at the Duke University Medical Center Archives and at the Eugene A. Stead, Jr. Center for Physician Assistants in Durham, NC. In August 2011, these holdings were transferred to the Society's safekeeping at its current location in Johns Creek, GA.

General Subject Boundaries & Acquisition Priorities

The Society ALM Collection's emphasis is historical and scholarly information about the physician assistant profession. Subject areas include but are not limited to development of the profession, national professional organizations, early educational programs/models, credentialing (i.e. accreditation, certification, and licensing), professional development, key events of the profession and people.

Limitations on Acquisitions

Acquisitions of materials will take into account the mandates and policies of other (archival) institutions, the resources required to gain intellectual and physical control over the materials in a reasonable period of time, the legal rights of the donor to gift the materials, the extent and terms of any restrictions, the material's relationship to the strengths and weaknesses of the existing collection, the availability of suitable storage facilities, and the physical condition of the materials. Due to the infeasibility of collecting all materials relating to the PA profession, as well as the undesirability of duplicating existing collections, administrative records of PA programs, PA professional organizations and International PA organizations are not subject for inclusion in this collection. Please contact our institution/organization should you need clarification about the scope of acquisitions.

*Under no circumstance can the PA History Society accept any item that contains mold.

*The PA History Society has the right to deny acceptance of any item at their discretion.

Languages

English is the preferred language of the PA History Collection.

Chronological Boundaries

The bulk of the collection dates from the 1960s to the present but there are no chronological limits for items that provide insight into the practice of team-oriented, health care services.

Geographical Boundaries

There are no geographical boundaries. While most of the collection is from within the United States, all areas will be considered for inclusion.

Types of Materials Collected

- Organizational Records (minutes, reports, correspondence, planning documents and internal publications)
- Personal Papers (correspondence, scrapbooks, personal items of interest to profession)
- Books or other published materials (dissertations, journals) *Only original copies of books or other published materials (articles, journal, dissertations, etc.) will be accepted. Unfortunately, we cannot accept copied documents.
- Still Images (hard copy or digital photographs, slides, digital presentations)
- Moving Images (film, video, DVD or other electronic formats)
- Oral Histories (audiotape, videotape, transcripts)
- Artifacts and memorabilia (objects that bear directly on the history of physician assistants and are of significant historical and scholarly value and are of dimensions and materials that can be housed permanently in the Society's current allocated space). *The PA History Society is no longer accepting personal awards, medals, plaques, and citations.

Format of Materials Collected

The materials stated above may be in a variety of formats, such as paper, electronic, audio-visual, or digital media. When information exists in more than one format, preference is given to formats with known longevity.

Donations/Gifts, and Loans

Donations will be accepted provided that (a) legal ownership of the item or collection is transferred through a signed Deed of Gift, (b) the item is appropriate (falls within the subject boundaries and is appropriate for the collection) (c) the item is in fair condition or can be repaired in-house except under very special circumstances. The Society does not appraise the value of donated collections or items. Donors should follow published IRS guidelines for requesting income tax credits for donated items to tax exempt organizations.

Deaccessioning (discarding materials)

The Society's managing director and archivist reserve the right to dispose of materials found to be inappropriate for the collection in accordance with the Deed of Transfer agreement entered into by Society regarding the collection. Options include returning materials to donors, offering materials to other institutions or organizations (when appropriate and feasible), and disposing materials.

Last Updated: August 18, 2023

Appendix 4: Example - Request for One-Time Use of Materials Form

Requested by:	Circle which one applies for desired use of materials. Educational use Publication/Broadcast Exhibit Other commercial use
Address:	
Telephone and Email address:	
Type of use (format, publication, publisher, author, date of publication)	
Materials Requested:	

Credit line must read: Photographs are courtesy of the Physician Assistant History Society

Conditions for Permission to Publish	
<ol style="list-style-type: none"> 1. Credit must be given to the PA History Society and to the creators of the item, if known. 2. Permission is for one-time use only. The PA History Society retains all rights to the items, and they are to be used only for the purpose listed in the permission form. 3. The requestor is responsible for securing any necessary permissions from the creator of the item or heirs, if known. The requestor agrees to hold the PA History Society and its employees blameless from any and all claims of any nature arising under this agreement, including any action involving infringement of the rights of any person, heir or descendant under statutory copyright. 4. The work will not be altered, modified, or distorted from its original appearance. 	
Requestor agrees to the conditions specified.	
Requestor:	Date:
Permission is granted for the use of the above listed item(s) owned by the PA History Society.	
Signed:	Date:

Appendix 5: Example - Records Retention Schedule

The following guidelines are suggested retention periods for retaining, disposing of, or archiving institutional records and related materials. These guidelines are examples taken from several archival institutions¹⁹. These should be modified and/or customized to meet each institution or organization's specific and legal needs.

Administrative Records

Records Series	Active Retention	Inactive Retention
A. Business/Committee minutes	3 years	Permanent
B. Organizational publications	2 years	Permanent
1. Bulletin, Brochures, Fliers		
2. Newsletters	2 years	Permanent
3. Event calendars	2 years	Permanent
4. Special publications, pictorials, programs from special events, clippings	While current	Permanent
C. Staff minutes/Strategic Planning Documents	2 years	Permanent
D. Committee Records*		
1. Standing Committees	2 years	Permanent
2. Special Appointed Committees/Task Groups	While current	Permanent
E. Correspondence		
1. Administrative (legal, personnel related)	2 years	Permanent
2. General	2 years	Evaluate for historical value
F. Equipment		
Includes purchase documents or lease contracts, and service contracts	Until equipment is discarded or returned to leaser	Discard

¹⁹ <https://www2.archivists.org/groups/museum-archives-section/3-records-management>

G. Insurance records (real property, liability, etc.)	While policy in effect	Permanent
H. Inventory records	Until updated	Permanent at 2 years updated intervals
I. Photographs, slides, audio & video tapes, DVDs	5 years	Evaluate for historical value
J. Policies and procedures	Until updated	Permanent
K. Resource/subject files	While current	Dispose when obsolete

Financial Records

A. Audit reports	While current	Permanent
B. Balance sheets and annual reports	While current	Permanent
C. Bank deposit statements	3 years	Discard (shred if account # listed)
D. Checks		
1. Cancelled, payroll, vouchers	7 years	Discard (shred if account # listed)
2. Check register	7 years	Discard (shred if account # listed)
E. Fidelity bonds	3 years	Retain when historically applicable
F. Financial statements		
1. Periodic	3 years	Permanent
2. Certified	3 years	Permanent
G. Investments	While Current	Permanent
H. Invoices from suppliers	3 years	Discard except major construction series
I. Journals, ledgers	While current	Permanent
J. Donation and Gifts records		
1. Year-to-date records	1 year after complete calendar year	Shred to destroy, to maintain confidentiality
2. Annual statements	7 years	Shred to destroy, to maintain confidentiality
K. Tax Statements		
1. Tax Exempt Certificates and Form 990	While current	Permanent; Original document in vital record storage

2. Tax Returns	7 years	Discard
3. Tax Withholding Authorization Records	Active Five years	Discard
L. Travel expense records	3 years	Discard

Legal Records

A. Bonds and related records	3 years past completion of bond	Permanent
B. Charter, constitution, by-laws	Keep copy of current documents in office	Permanent; Original documents in vital record storage
C. Contracts	1 year after completion	Evaluate for transfer to Historical Committee
D. Endowments/wills	Convenience copy	Permanent
E. Incorporation records	Convenience copy	Permanent; Original document in vital record storage
F. Licenses (federal, state, local, notary)	Current	Permanent; Original documents in vital record storage
G. Property records, deeds, mortgages, land records	Convenience copy	

Membership or Class Records

A. Chronological Roster/Directory	Current	Permanent, periodic transfer to Archives; block out private information
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Personnel Records

A. Individual employee file: Contains (but not limited to) application, I-9 forms, changes in status, termination, sabbatical or long-term leave approval, performance appraisals, tax records, retirement/annuity records	Retain 3 years after resignation or termination of employee	SHRED TO DISCARD
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B. Job description/organization chart	Retain in personnel 3 years after being superseded	Permanent; Add to Historical Collection once superseded
C. Group insurance plan	While active	Permanent, add to Historical Collection once superseded
D. Personnel manual including benefits polices and procedure records	Convenience copy; discard when superseded	Original for permanent storage; add to Historical Collection once superseded

Appendix 6: Example - Oral History & Photographic Permission to Use Form

I, _____, hereby give permission to the PA History Society, a nonprofit organization incorporated in North Carolina, to reproduce, use and distribute my video-taped oral history, photographs; and other materials that I have personally donated to the Society and that are contained in my file, for printed or electronic publications - provided that the source is acknowledged. The Society has my permission to use these materials to create, update and maintain a collection of material and videos posted on their PA History Society's website and server.

In addition to my video-taped oral history and materials that I have personally donated for this purpose, I understand that my file may contain material collected by the Society from outside sources. Use and access to these materials will be left to the discretion of the Society as stated below.

I understand that any use of material contained in my file that is determined to be "fair use" under Section 107 or that satisfies the conditions specified in Section 108 of the U.S. Copyright Law (17 USC, as revised by P.L. 94-553) does not require my permission and can be used by the Society accordingly.

I understand that republication, systematic reproduction, posting in electronic form on servers, or other uses of this material, except as exempted by the above statements, requires written permission or license from the Society or from the recognized creator or copyright owner of said materials.

The Society has my permission now and in perpetuity to act as my agent with third parties who may wish to use these materials for academic, research or promotional purposes.

(Signature of Granter)

(Date)

(Signature of Society Representative)

(Date)

Appendix 7: Sample Oral Histories Interview Questions

Purpose:

To provide stakeholders (PA Students, PA Program Faculty, PAs and the general public) with a variety of interesting stories about PAs to capture the history of the PA profession.

Sample Interview Questions:

1. What has been the most satisfying aspect of your PA career?
2. Tell us about a particularly memorable patient that made you glad that you chose to be a PA.
3. What was the biggest challenge you faced or obstacle that you overcame as a PA.
4. Do you have a favorite mentor that you would like to acknowledge and why?
5. How did you decide to become involved in healthcare?
6. What influenced you to become a PA?
7. What is the most interesting or touching experience you have encountered as a PA?

Interview Requirements:

All interviews (audio & video) must begin with an *Introduction of interviewer and interviewee, the date and location of the interview.*

Ex: My name is _____ and today is Thursday, October 26, 2024. I'm attending the annual PAEA Conference in Anaheim, CA and am conducting this oral history interview for the PA History Society.

Appendix 8: Tips for Long Distance Oral History Interviews

Before the Interview:

- Determine the goal of the interview and focus on 1-2 topics.
- Do background research beforehand.
- Develop brief, to the point, open-ended questions.
- Develop a signed release form for the interviewee.
- Share with the interviewee beforehand:
 - Purpose of the interview and set of proposed questions.
 - Select time for undisturbed interview – no pets or other people to disturb the interview with background noise, etc.
 - Ask interviewee to select place for the interview that is quiet and undisturbed (Room in the house with a door that can close, let partners and children know not to disturb, etc.)
 - Share the length of the interview (30 minutes to an hour is the recommended length of time for an interview)
- Make sure that the interviewer and interviewee will have:
 - Strong, consistent internet connection during the length of the interview
 - Computers with webcam and microphone capability (Even if the computer has a built-in microphone, headsets sometimes will have the better sound quality)
 - Both computers are able to run the recording software (Google Hangouts, Zoom, Skype, etc.)
- Do a practice run of recording equipment beforehand and, if possible, arrange a brief five-minute practice run with the interviewee a few days before the interview to make sure software requirements are met and to troubleshoot before the actual interview.

During the Interview:

- Make sure that all devices that use wi-fi are turned off if using a wi-fi connection ensure it is a strong internet connection; sometimes connection directly to the router with an ethernet cable is the best way to ensure a strong, stable connection.
- Turn off all phones and computer alerts (such as email alerts) to make sure there will be no distracting noises during the interview.
- Ask one question at a time.
- Pause between questions or comments to account for lag over the internet.
- Listen actively and intently.
- Encourage stories and more details about the topic of the interview.
- Clarify questions if needed.
- Be flexible to explore new topics the interviewee may introduce.

After the Interview:

- Send an email to thank the interviewee along with an approximate timeline for editing, transcription, etc.
- Send them a copy of the interview to review and approve.
- Make sure that the interviewee signs and returns the release form.

Long Distance Interview Software Options

- Zoom (<https://zoom.us/>) – Can record interview, but session without a paid account can only last 40 minutes.
- Skype (<https://www.skype.com/en/>) – Free software. Free accounts will only let two people on a “call” or interview.
- Google Meet (<https://meet.google.com/>) – Need a paid account to record interviews. Cheapest subscription is \$6 a month.
- Microsoft Teams (<https://www.microsoft.com/en-us/microsoft-teams/free-video-conferencing>) – Free version allows 60 minute sessions for up to 100 people. Only host needs to have Teams software installed for meetings.

Appendix 9: Example - Biographical Sketch Form

Biographical Sketch Form: Please Do Not Exceed Four Pages			
<i>(Please Type or Print)</i>		<i>For (add your organization name) use only/Received Date:</i>	
NAME:		CURRENT POSITION TITLE:	
IF RETIRED, LAST POSITION TITLE:		SUBMIT 2 PHOTOGRAPHS <i>See details on next page</i>	
ADDRESS:			
CITY:		STATE:	ZIP CODE:
TELEPHONE:		EMAIL:	
PLEASE NOTE: You may choose to attach your resume or CV to this document and fill out only the boxes above the blue line. Or, if you do not have a resume or CV, please fill out this complete form.			
EDUCATION/TRAINING <i>(Begin with baccalaureate or other initial professional education and conclude with postdoctoral training.)</i>			
INSTITUTION AND LOCATION	DEGREE <i>(if applicable)</i>	YEAR(s)	FIELD OF STUDY
POSITIONS <i>(List in chronological order by year meaningful career highlights, professional-related experiences, concluding with your most recent position.)</i>			
POSTION TITLE AND LOCATION	YEAR(s)	PRIMARY RESPONSIBILITY (DUTY)	
PROFESSIONAL SERVICES <i>(List in chronological order by year key professional-related services provided to organizations, foundations, government, or private agencies, concluding with your most recent service).</i>			

ENTITY AND LOCATION	YEAR(s)	SERVICE RENDERED

HONORS *(List in chronological order by year **key** professional-related honors that you have received from organizations, foundations, government, or private agencies, concluding with your most recent honor).*

ENTITY AND LOCATION	YEAR(s)	Honor, Award or Recognition

NOTE: The Biographical Sketch may not exceed four pages.

- B. Please submit 2 photographs: (1) current headshot and (1) displaying historical significance (I.e. your PA Program graduation, you working in a clinical or educational setting, etc.)
- C. Please list on the blank page any key or selected peer-reviewed publications authored or coauthored by you related to the PA Profession or other Health Care Issues of importance (in chronological order, concluding with most recent). Do not include publications submitted or in preparation.
- D. Please use the blank page to list and briefly describe activities, issues, or events that you were involved in that helped develop or shape the PA profession, directly or indirectly.

Appendix 10: Example - Biographical & Photographic Permission To Use Form

I, _____, hereby give permission to the Society, a nonprofit organization incorporated in North Carolina, to reproduce, use and distribute photographs; biographical information; and other materials that I have personally donated to the Society and that are contained in my biographical file, for printed or electronic publications - provided that the source is acknowledged. The Society has my permission to use these materials to create, update and maintain a biographical sketch posted on their PA History Society's website and server.

In addition to materials that I have personally donated for this purpose, I understand that my file may contain material collected by the Society from outside sources. Use and access to these materials will be left to the discretion of the Society as stated below.

I understand that any use of material contained in my biographical file that is determined to be "fair use" under Section 107 or that satisfies the conditions specified in Section 108 of the U.S. Copyright Law (17 USC, as revised by P.L. 94-553) does not require my permission and can be used by the Society accordingly.

I understand that republication, systematic reproduction, posting in electronic form on servers, or other uses of this material, except as exempted by the above statements, requires written permission or license from the Society or from the recognized creator or copyright owner of said materials.

The Society has my permission now and in perpetuity to act as my agent with third parties who may wish to use these materials for academic, research or promotional purposes.

(Signature of Granter)

(Date)

(Signature of Society Representative)

(Date)



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