



# Historian's Guidebook



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## **Support from Society Headquarters**

A regional Chapter Resource Consultant is ready to assist your chapter with ongoing development, resources, and needs. For more information, contact your consultant at Headquarters by calling 800-284-3167, or access Chapter Services Online at [www.kdp.org](http://www.kdp.org).



## **Section 1: Responsibilities**

### ***Responsibilities of the Historian***

Kappa Delta Pi Bylaws describe the following responsibilities of the Historian:

- Furnish reports of chapter activities for consideration and use in appropriate Society publications and award applications; and
- Assist the Counselor in the preservation of the charter, documents, and historical records of the chapter.

The Historian also must:

- Keep a portfolio of chapter officers, activities, and programs;
- Be familiar with Kappa Delta Pi's Society history;
- Take photographs of all chapter activities;
- Submit noteworthy items to Society Headquarters to be included in the chapter's history file or in upcoming publications;
- Request chapter chartering and historical information from Society Headquarters to use in the initiation ceremony; and
- Prepare a historical display of the chapter for initiations and other events.

### ***Guidelines for Preserving Chapter History***

- Use the Achieving Chapter Excellence (ACE) Award application information as a guide for documenting chapter activities. The criteria may be found at [www.kdp.org](http://www.kdp.org) in Chapter Services section.
- Preserve a copy of all agendas and minutes of meetings by year.
- Document photographs in sequential order in a scrapbook, identifying activity and people.
- Keep an overview of important dates in the chapter's history so that anniversaries can be commemorated.
- Use historical facts in chapter newsletters to inform members about past programs.
- By year, collect all chapter publications, project descriptions, and publicity on special projects.
- Create a file for all official documents (see Archive Organization System in the Appendix of this guidebook).

Materials that can be discarded:

- Flyers or notices of meetings.
- Routine correspondence, such as receipts or cover letters from Society Headquarters.
- After seven years, canceled checks, check stubs, statements, invoices, and receipts.

## ***Responsibilities of the Standing Committees***

The President, Membership Chair, and Vice President coordinate the following Standing Committees, respectively:

### **Executive Committee**

The Executive Committee is composed of the elected officers—Counselor, President, Vice President, Membership Chair, Treasurer, Secretary, Historian, and Foundation Representative.

- Set goals for the chapter;
- Prepare calendar for the year;
- Vote on major issues of the chapter, including bylaws, budget, and local scholarship amount(s); and
- Oversee all chapter operations.

### **Membership Committee**

- Generate list of potential members;
- Prepare and implement orientation program;
- Coordinate initiation ceremony;
- Work with Secretary and Treasurer to complete initiate list information; and
- Conduct Member Interest Survey that is included with the *Membership Chair's Guidebook* or at [www.kdp.org](http://www.kdp.org) in the Chapter Services section.

### **Program Committee**

- Compile data from the Member Interest Survey conducted by the Membership Committee to plan annual calendar of programs;
- Coordinate fund-raisers, job-search preparation programs, service projects, speakers, and other creative ideas to provide new opportunities and experiences for chapter membership;
- Coordinate programs to recognize member accomplishments; and
- Monitor progress; follow up with subcommittee chairs periodically.

## ***Overview of Officer Responsibilities***

The following officers are members of the chapter's Executive Committee. This suggested list of officer responsibilities may need to be adapted to fit the chapter's structure.

### **President**

- Preside over all general membership and Executive Committee meetings;
- Organize officer elections and officer transition;
- Complete Annual Report after Treasurer has completed the financial section;
- Appoint committee members when necessary;
- Monitor performance of committees;
- Guide the Executive Committee in setting chapter goals and preparing the chapter calendar;

- Recognize membership accomplishments;
- Be familiar with governing principles of Kappa Delta Pi;
- Participate in chapter programs and activities; and
- Submit reports as required.

### **Vice President**

- Preside in absence of the President;
- Chair the Program Committee and conduct programs designed to maximize member retention; and
- Conduct all public relations for the chapter. Ideally, public relations should be conducted by an entire committee, with the Vice President serving as chair.

### **Membership Chair**

- Preside over meetings of the Membership Committee;
- Manage selection of members;
- Host recruitment efforts; and
- Create and implement ongoing methods for retaining membership.

### **Treasurer**

- Receive and record all new initiate documents;
- Keep accurate records of chapter funds;
- Complete the financial section of the Annual Report;
- Access university funding;
- Coordinate the budget preparation process; and
- Assist Vice President, Program Committee, and Foundation Representative with development of fund-raisers.

### **Secretary**

- Maintain minutes and attendance records at meetings;
- Formulate agenda, in conjunction with the President, to be used at meetings;
- Submit New Initiate Information Forms and fees within two weeks after the initiation;
- Conduct all chapter correspondence; and
- Maintain accurate records of active, inactive, and chapter membership.

### **Historian**

- Preserve all chapter documents and historical records;
- Develop a photographic history of the chapter;
- Call Headquarters at least four weeks prior to chapter's initiation for historical information (if not already obtained); and
- Document chapter activities and forward to Society Headquarters.

### **Foundation Representative**

- Develop fund-raising programs to motivate individuals to donate to Kappa Delta Pi's Educational Foundation;

- Promote Foundation scholarships; and
- Become the liaison between the chapter and the Kappa Delta Pi Educational Foundation.

### **Counselor**

- Install the officers of the local chapter;
- Serve as a member of the chapter's Executive Committee;
- Mentor chapter officers;
- Serve on the Membership Committee;
- Assist in planning chapter activities; and
- Act as a liaison between the chapter, college faculty, and administration to keep others informed of activities and events.

### ***Additional Committees and Chairs***

To properly document and maintain the chapter's history, the Historian may want to form ad hoc committees for certain tasks. This not only ensures that the tasks are completed in a timely manner, but also that the members have opportunities to become involved.

Below are sample committees that pertain to this role. The Historian serves as committee chair or ex-officio, depending on the preferences and goals of the Executive Committee. Refer to the *Committee Management Guidebook* for more information on committee leadership.

The Historian may coordinate the following committees or subcommittees to offer member and chapter recognition:

- ACE Award
- Awards
- Member Participation Program
- Portfolio/Scrapbooking
- Reporting

## **Section 2: Chapter Archives at Society Headquarters**

Each chapter has a file at Society Headquarters containing historical data that has been provided by the chapter through the years. To keep this information current and to show the range of chapter involvement, the Historian should send information about special projects to Society Headquarters. Please mail reports and photographs of the people and event, and all other documentation of chapter projects.

### **Section 3: Portfolios**

Portfolios, like scrapbooks, can provide creative documentation of the chapter. Preserving a history of the chapter permits later groups of members to remember and build upon the experiences. Initiation ceremonies are a great place to display the portfolio, awards, plaques, and other information about the chapter. New initiates, veteran members, and guests enjoy seeing the past activities and members of a chapter. Moreover, the new leaders are able to review and emulate the successful events and strategies of the chapter.

Photographs of all chapter activities are an important part of chapter history. If the Historian is unable to attend an event, a substitute photographer must be assigned. Once the pictures have been developed, chapter members should help the Historian identify the people in the pictures. The event, date, and people must be listed on the back of each picture. All the pictures are then placed in the chapter portfolio, as in a scrapbook, with captions identifying the event, date, and people.

The Historian should ask for members to help with the upkeep of the portfolio and for ideas on other ways to inform people of chapter history. The Historian may want to form a committee for this task.

## **APPENDIX: Archive Organization System**

The following is a sample of a system to organize chapter documents. Contact your Chapter Resource Consultant for assistance in tailoring this system to the chapter's space allotment.

### **1. Official Records**

- A. Chartering Information
- B. International Constitution and Bylaws, and local Chapter Bylaws
- C. Ceremonies and Rituals Booklet
- D. History of the Chapter
- E. Current Society Handbook

### **2. Chapter**

- A. Minutes
- B. Communication
- C. Reports
- D. Programs
- E. Budget

### **3. Officers**

- A. List of Officers by Year
- B. President Activity
- C. Vice President Activity
- D. Secretary Activity
- E. Treasurer Activity
- F. Historian Activity
- G. Foundation Representative Activity
- H. Membership Chair Activity
- I. Counselor/Associate Counselor Activity

### **4. Committees**

- A. List of Committees
- B. Executive Committee Meeting Minutes
- C. Program Committee Activity Reports
- D. Membership Committee Activity Reports
- E. Ad Hoc Committees Activity Reports

### **5. Publications**

- A. Kappa Delta Pi Record
- B. The Leader and Regional Newsletters, Society e-newsletters
- C. Chapter newsletters
- D. *The Educational Forum*
- E. *New Teacher Advocate*
- F. *Kadelpian*

**6. Portfolio**

- A. Newspaper Articles
- B. Photographs
- C. Sample Event Flyers, Invitations, and Notices
- D. Index of Past Portfolios

**7. Membership**

- A. Active
- B. Inactive
- C. Honorary
- D. Past New Initiate Information Forms

**8. Awards and Honors**

- A. Awards Received by Chapter and Members
- B. Awards Given by Chapter

**9. Miscellaneous**

Review ACE Award criteria for additional suggestions of items to retain as a part of the chapter history.