

ASHRAE

REGIONAL
and
CHAPTER
HISTORIAN'S
GUIDE

June 2019

HISTORIAN'S GUIDE

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Preceding guide: "ASHRAE - Regional and Chapter Historian's Guide", dated: 6/2011.

INTRODUCTION

The ASHRAE Regional and Chapter Historian's Guide is a reference manual for members of the Historical Committee as well as chapter and regional historians.

It describes the ASHRAE SOCIETY HISTORICAL COMMITTEE, gives the regional historian's duties and responsibilities, and has specific instructions to assist the chapter historian in carrying out the role in the Society/Chapter organization.

This Guide is to be used in conjunction with other reference material such as:

1. The Manual for Chapter Operations
2. The "Presidential Newsletter" that establishes PAOE point activity criteria.
3. Information issued through Society publications and the Society Historical Committee.
4. Information issued through the Regional Historian as the direct liaison with Society policy.

The regional historian will prepare "Chapter Historian's CRC Workshop Reference Materials in electronic format" to be used at the annual CRC. This "Handbook" will contain information for the chapter historians of that region. (See *Appendix "K", p. K1.*)

The chapter historian should utilize the regional historian as a source of information and guidance in carrying out the duties of the historian office.

The Society **recognizes** and **appreciates** the vital role that the historians play in identifying and preserving the accomplishments of its members and the industry in the past, as guidelines for the future.

THE ASHRAE HISTORICAL COMMITTEE

The ASHRAE HISTORICAL COMMITTEE was established by the Board of Directors as a General Committee of the Society on January 31, 1973. It meets twice a year at the ASHRAE Society winter and annual meetings, and reports to Publishing and Education Council.

PURPOSE: To encourage and carry on historical research and provide support to history related activities of the Society.

To develop through publications and Society Programs, an awareness of ASHRAE's and of the HVAC industry's history among Society members.

MAKEUP: Members of the Historical Committee are appointed by the Society President-Elect. According to the ROB (Rules of the Board), the committee shall consist of:

- Seven voting members.
- One voting member shall be appointed chair and one voting member vice chair.
- Consultants (at discretion of the Society President-Elect).
- Ex-officio Board of Directors.
- Coordinating officer.
- Staff liaison.

RESPONSIBILITIES: Responsibilities/Duties are given in the ROB. The following activities are guidelines to accomplishing these responsibilities:

1. Researching pertinent existing publications and patents.
2. Searching for artifacts and historical pieces of equipment having particular impact on the development of the HVAC industry.
3. Conducting historical programs.
4. Coordinating historical displays at Society meetings.
5. Encouraging authorship and publication of historical articles.
6. Providing guidance to region historians for historical activities on the regional and chapter levels.
7. Recording interviews with Society and industry leaders in the "Leadership Recall Program".

REGIONAL HISTORIAN

In June 1978, the position of Regional Historian was created by the ASHRAE Board of Directors and is appointed by the Director and Regional Chair (DRC). Guidelines were established by the Society Historical Committee for the Regional Historians as follows:

1. Aid and encourage the chapter historian and communicate often.
2. Receive and retain chapter publications and minutes of the annual CRC, under the guidance and direction of the DRC. Also, receive copies of communications from headquarters' staff that are sent by the Society to chapter historians.
3. Seek regional sources of artifacts, photographs and documentary articles relating to the HVAC industry through chapter historians.
4. Collect historical pictures and data that could be used for publication from major manufacturers who are willing to furnish them.
5. Make inquiries through chapters as to which libraries have materials, publications and references of interest to our members as well as which libraries would be willing to receive such items.
6. Oversee PAOE points for the current year on the ASHRAE website for Historical that are entered by the chapter historians and enter points that are assigned to the Regional historian...
7. Coordinate time and facilities for the annual CRC with the DRC & General Chair to hold a workshop for chapter historians and encourage historians' attendance.

Note: The regional historian shall assemble electronic materials for distribution to chapter historians prior to or immediately after the CRC workshop. This is to be used for reference and guidance. (See Appendix "K", p.K1.)

8. Review and seek comments on the individual chapter Gold Ribbon entries, send in entries to Society and present Gold Ribbon Awards at CRC.
9. Maintain and record lists of all members receiving Regional and Society Awards.
10. Maintain a list of all regional officers.
11. Prepare and annually update the history for the region on the Historical Committee's website.

CHAPTER HISTORIAN

The position of Chapter Historian is appointed by the Chapter President. The chapter historian should be an interested member who need not be replaced annually and whose material could be made chapter property.

A. Goals of the Historian:

1. The primary goal is to establish a written history of the chapter that can be added to in an orderly manner as time passes.
2. Another goal is to record in written record important accomplishments in our industry within the chapter area. Important patents, ~~and~~ inventions and advancements in the art of HVAC made by individuals or firms in the chapter area. Even if the people involved at the time were not ASHRAE members their work should be recognized.

B. Region make-up: Chapter historians should receive a list of the names, addresses, phone numbers, and email addresses of all chapter historians in the region and also that of the regional historian. (This data will be furnished by director and regional chair (DRC) to the regional historian and contained in the materials suggested in *Appendix "K", on page. K1.*)

C. Duties for the Chapter Historian: Guidelines are located in the "MANUAL FOR CHAPTER OPERATIONS". (For a copy see *Appendix "A", page. A1.*)

D. Additional guidelines for historian's duties are as follows:

1. Gather the materials offered from previous historian or from officers of the chapter. Expect to receive:
 - a. Chapter Charter—this is the keystone of your records.
 - b. Bylaws of your Chapter—these are the working rules of the chapter.
 - c. Meeting minutes from the secretary.
 - d. Meeting notices.
 - e. Press clippings from previously held events.
 - f. Correspondence—into or out from the chapter.
 - g. Rosters—of members from past years.
 - h. Account books or treasurer's records.
 - i. Photos from events of the past, recent or remote.
 - j. Chapter History and Fifth-year Update.
 - k. Histories of local companies or individuals.
 - l. Membership lists.
 - m. Copies of "History of Chapter Property and Officers" as included in the "Manual for Chapter Operations". (See Appendix "B", pp. B1-B2.)
 - n. List of Awards and Honors to members.

CHAPTER HISTORIAN (cont.)

2. Study the items you receive before filing. Duplicates (beyond two) can be destroyed, but in some cases people named may enjoy receiving surplus items. Such gifts may provoke a trade of other items not now in historical files.
3. Categorize items according to similar characteristics. This is easy when it can be seen, such as a large group of meeting minutes. The chore becomes more difficult with correspondence on assorted subjects. Chronological ordering may work for some materials.
- 4 Identify and index properly, and the need to "rummage" through material is reduced. Such "rummaging" is hard on materials and shortens life of the files.
5. Protect the material gathered, studied, categorized and identified to allow it to remain in the same worked condition. Consider the use of electronic storage media as much as practical for storage, backup, or duplication. Some historians have found space in personal or business metal file cabinets, but the Chapter's finances have usually dictated that these are loaned to the task. Protect from possible loss through fire or environmental conditions as much as practical. Sometimes a dual storage may be considered, but the cost of duplication and identical care in separate locations can be prohibitive. Protect the future of the historian's role by clearly telling your chapter and the regional historian the location of your files. Annual display of chapter historian's photos is made at the CRC meeting. Protect historical material by insisting on the return of items borrowed from files. Preferably, suggest that only copies be utilized for future needs, allowing the original item to remain in the historian's safekeeping.
6. Storing material of your Chapter is important. Chapter historians can be a prime source of information and data that would be of assistance to the Society Historical Committee in carrying out its responsibilities. The past of ASHRAE is the path to the present, and the standard against which the future will be measured. Store well so that occasional use can be made of the files to prepare histories and because the storage of artifacts will probably always remain beyond the ability of ASHRAE. (Further information in *Appendix "F", p. F1 and Appendix "G", pp. G1-G2.*)
7. The chapter historian may know of a person who was involved in the early development of the HVAC Industry. Also, he might know of the location of a piece of equipment that would be valuable in building up a pictorial history of the development of the industry. This type of information would be a prime basis for the *second or third entry* by a chapter for **The GOLD RIBBON AWARD**, as noted on page 8, Future Submissions.

THE CHAPTER HISTORY

*Establish a plan for the production of the history.
(Chapter History must be completed first for Gold Ribbon Award)*

1. Selection of author. Select from among the older long-time chapter members a manageable group who will agree to participate in writing a chapter history.
2. Selection of content and format. Meet with the project participants to determine what subjects, time periods, and other information should be included in the history. While a narrative approach is generally used in a history, some important types of information are best included as appended documents, lists, statistics, or brief sketches. Create a Timeline. (See Appendix P).
3. Suggestions of subjects/topics to be included in an organizational history:
 - a) **The Founding.** When, how, where, by whom. Biographical sketches of charter members establishing why they formed the organization. Types of members it attracted at first. Projects it undertook related to its purpose or interests of its members.
 - b) **Growth and Development.** Description of projects, events, circumstances, and/or persons that shaped, altered, or expanded the organization's purpose, activities, or role in the community. Corresponding changes in membership, structure, activity, influence and fiscal and general well-being, including periods of decline.
 - c) **Special Descriptive Profiles.** Projects of great influence or of continuing interest. Persons who shaped the organization including important officers, key members (visible and behind-the-scenes) and benefactors.
 - d) **Appendices.** Constitutions and by-laws, including important changes; organizational charts; lists of officers; profiles of membership growth including numbers, social and economic groups; brief biographies of presidents; annual reports; abstracts of treasurer's reports to show amounts of dues, sources of revenue, and types of expenditures.

It is not necessary to include in the Chapter History all of the chapter minutes, meeting schedules, agenda, newsletters, financial records, etc., which have accumulated. These are for the record only. A narrative record of the chapter's founding, growth and other truly interesting happenings during the years of the chapter's life are what is wanted.

Chapter members who have been active regionally or on the Society level, or who have received any special awards can be included as part of the chapter's history.

The Gold Ribbon Award

Background Information

ASHRAE Board of Directors approved a chapter Gold Ribbon Award in January 1981(motion 00-10-28-29-57) to reward chapter historians for their efforts in compiling information on significant events in the history of HVAC&R, with the initial emphasis on detailing a chapter's history since its chartering.

Selection Process

Prior to the annual CRC (Chapters Regional Conference), the Regional Historian and the Director and Regional Chair (DRC) select Gold Ribbon winners based on the submissions by the various chapter historians and the historical significance of each submission from the previous Society year. For fall CRCs, it is the Society year that ends in the same calendar year. For spring CRCs, it is the Society year ending in the previous calendar year. There can be multiple winners annually. Each Chapter is eligible to win a Gold Ribbon each year if they submit a history deemed Gold Ribbon worthy. The award can be won by the same individual several times in a row.

Presentation

The Gold Ribbon is awarded to the chapter for mounting on the chapter awards banner (see Appendix D). The personalized certificate is awarded to the Chapter Historian (see Appendix E). The award is presented by the Regional Historian at the annual CRC. The winners are to be recorded in the CRC Minutes.

First Step Needed to Win

As the first step in winning a Gold Ribbon, a chapter must have completed an initial history of their chapter covering a minimum of five years of history. Generally, the chapter historian is responsible for writing the histories. Thereafter the Gold Ribbon can be won for each additional minimum five years of history of the chapter or for other histories as detailed in Future Submissions. The ultimate goal is to have a complete record of the chapter's history back to its founding, as well as key events that led up to the formation of the chapter, whether it is done all at once or over a period of years.

Details for the Chapter History Submission

The chapter history needs be in a narrative format and must follow a chronological order. Refer to the preceding page 7 for details on the requirements for the chapter history. All submissions should be digitized for easy transfer and should be added to the chapter's website.

The Gold Ribbon Award (cont.)

Future Submissions

Once the first five years of chapter history is complete, the next step to winning a Gold Ribbon in future years would be to keep the chapter history up to date as well as adding to previous years as information becomes available. A five-year update from the previously submitted chapter history is required to win the Gold Ribbon. Or you can do a history of a person (see Appendix M) or a company, a system, an event, a piece of equipment, site, or an artifact or project particularly at a site with a heritage listing (see Appendix L). Acquiring background information can be from within an organization, retired employees, or company files. The presentation needs to include enough scope and detail to impress those evaluating the entry and should include a copy in electronic format if possible. Only one gold ribbon will be awarded to a chapter per year.

Waiver of Commercial Statement

Society has authorized the use of trade names, manufacturer's names, etc., in historic articles or reports.

Timing for Entries for the Gold Ribbon Award.

Entries need to be submitted to the Regional Historian and to Vickie Grant at ASHRAE (vgrant@ashrae.org) and to the staff liaison along with the submittal form approximately 60 days prior to the CRC. The submittal must be in electronic format. The Regional Historian must contact Society headquarters 30 days before the CRC in order for the certificates and ribbons to be sent prior to the CRC. The electronic submittal may be emailed or mailed to Vickie Grant at ASHRAE 1791 Tullie Circle, N.E. Atlanta, Ga. 30329 and can be a CD or USB drive or as an attachment to an email.

Entries for the Lou Flagg Award

The Regional Historian may select the most outstanding Gold Ribbon Award winners from his/her region for consideration for the Lou Flagg Award. Submissions need to be sent to Society headquarters before December 1 each year. Refer to Appendix O for the selection criteria. In addition, a member of the Society Historical Committee may also nominate other members of the Society who have prepared historical presentations that fall within the definition of historical significance as described below.

Refer to Appendix O for the selection criteria.

LEADERSHIP VOICES INTERVIEW

LEADERSHIP VOICES was started in the 1980s. This program involves audio and video taped interviews with Society Past Presidents and other members of distinction on the Society level. These interviews are to be indexed.

This activity is conducted by the Historical Committee with the interview being conducted by a member of the Historical Committee at Society meetings. At times, it may be necessary for a designated person to do the interview locally.

These recordings were originally kept in the ASHRAE Headquarters Library, but the original VHS tapes were copied to DVD or CD prior to the 2007 building renovation and the original tapes were disposed of. However, most of reviews are also available online: <https://www.ashrae.org/leadership/leadership-voices>

CHAPTER AND REGIONAL LEADERSHIP RECALL

A modified version of the interview is done at the chapter level when the member is of local or regional prominence.

Interviews will be arranged by the chapter historian. They may be done with an audio or video recorder. These types of interviews should be indexed for easy reference if taped. Also, the interview can be written.

These interviews are reviewed by the regional historian, and the originals are kept in the local chapter's historical files.

(For Leadership Recall Interviews Guidelines, see p.10. Also for more goals and guidelines, see Appendixes "H", pp. H1-H2, "I", pp. I1-I4. For Interview questions, see Appendix "N", p. N1.)

GUIDELINES FOR LEADERSHIP ~~RECALL~~ VOICES INTERVIEW

(These guidelines were written for Society level interviews, but aspects of these may apply to regional and chapter-level interviews also.)

The purpose of *Leadership Voices* is to capture primary historical source material for inclusion in the Society's archives. These archives are accessed by Society members, staff and historians when they research the advancement of thermal engineering and the growth of the HVAC&R industry and of ASHRAE.

Five essentials to keep in mind when you conduct your interview:

1. GO WITH THE FLOW.

Have an interview plan, but depart from it when needed to make the interview entertaining. Imagine yourself a talk-show host. In fact, you are. (Nothing is worse than having the subject enter a rich area of potential comment and the interviewer not following-up.)

2. DON'T INTERRUPT—DON'T ADD "UH", "I SEE", "THAT'S GREAT", ETC.

Remember that you are "miked" too. We want complete sound bites from these Society leaders and industry pioneers. If the interviewer interrupts, it makes editing more difficult. Think of a documentary that includes video footage of an expert speaking on screen. That is the type of product which could result from your work.

3. USE A PROFESSIONAL VIDEO CREW.

You or another chapter member could show up with a home video cam, but a professional knows how to use lighting and will (or should have) microphones for you and the subject. They will provide reminders to not move in your chairs. Most importantly, their camera will work. The investment in using professionals is worthwhile. That is why ASHRAE provides funding at the Society level for pre-approved recording within, of course, budgetary limits. All editing of Society level videos will be done by ASHRAE staff. Two cameras should be used: one fixed on the subject and the other on the interviewer and the subject. (An experienced crew can also occasionally isolate on the interviewer alone.) Use separate microphones for the subject and the interviewer. A local university may be able to do the recording for you at reasonable cost. Some large companies may have a studio and be willing to accommodate taping.

4. CONDUCT A PRE-INTERVIEW WITH THE CANDIDATE.

Do research in advance. Establish what the subject wants to discuss. From ASHRAE's perspective, make sure you cover the big picture; that is, how has ASHRAE changed, how has the industry changed, what effect has our technology had on the public, etc. Give the subject a list of questions you plan to ask. (See Appendix "N", p. N1.)

5. WHEN THE RECORDING BEGINS, INTRODUCE YOURSELF, GIVE THE DATE AND PLACE, AND IDENTIFY WHO YOU ARE GOING TO INTERVIEW.

Duties of Chapter Historian

Taken from **MANUAL FOR CHAPTER OPERATIONS – 2018** (Section 2.9, p. 2 - 6)

2.9 Historical Committee and/or Chapter Historian

The Chapter Historian and/or Historical Committee is appointed by the President-Elect. Responsibilities of the Historian/Historical Committee typically include:

A. Requesting Chapter Historians to interview presidential and long-time members to provide in writing or on audio tape memories of industry history and its progress for inclusion in records, at the CRC and/or on the chapter's website

B. Taking pictures of chapter functions and, if possible, of old air conditioning and refrigeration installations for inclusion in eNewsletters, records and programs

C. Checking with the chapter past and present officers for the availability of chapter items of a historical nature

D. Attending the CRC – including the History workshop – and reporting the chapter's progress to the Regional Historian for comparison with other chapters

E. Providing the chapter eNewsletter editor articles about chapter history and progress to include in the eNewsletter

F. Updating historical records annually, including updating the location of chapter property

Sample spreadsheets for tracking chapter officers and location of chapter property are provided in Appendix 2D.

G. Preparing a display for CRC and showing at a chapter meeting at least once a year

H. Preparing a written or digital history of the chapter, member, company or equipment specific to the chapter for submission for a Gold Ribbon Award and if awarded a Gold Ribbon, to be considered for the Lou Flagg Award.

In addition to the above, there are four more guidelines:

1. The chapter roster should also contain a brief history of the chapter.
2. Update the current year's "Presidential Newsletter's" PAOE point status for Historical on the ASHRAE website.
3. The chapter historian should attend chapter and board meetings to give reports including PAOE point status.
4. Refer to the current "Manual for Chapter Operations" for an update on requirements and historical record forms.

MANUAL FOR CHAPTER OPERATIONS – 2018 (Appendix 2D)

HISTORY OF CHAPTER OFFICERS

_____ CHAPTER

<u>Officer</u>	<u>Year ()</u>	<u>Year ()</u>	<u>Year ()</u>	<u>Year ()</u>
President	_____	_____	_____	_____
Pres.-Elect	_____	_____	_____	_____
V.P. - 1 st	_____	_____	_____	_____
2 nd	_____	_____	_____	_____
Secretary	_____	_____	_____	_____
Treasurer	_____	_____	_____	_____
B.O.G. 1	_____	_____	_____	_____
2	_____	_____	_____	_____
3	_____	_____	_____	_____
4	_____	_____	_____	_____
5	_____	_____	_____	_____
6	_____	_____	_____	_____
CRC Delegate	_____	_____	_____	_____
CRC Alternate	_____	_____	_____	_____
<u>Committee Chairs:</u>				
Student Activities	_____	_____	_____	_____
Membership	_____	_____	_____	_____
Promotion	_____	_____	_____	_____
Research Promotion	_____	_____	_____	_____
Chapter Technology	_____	_____	_____	_____
Transfer	_____	_____	_____	_____
<u>Standing General</u>				
<u>Committees</u>				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
<u>Society Service:</u>				
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

MANUAL FOR CHAPTER OPERATIONS – 2018 (Appendix 2D)

HISTORY OF CHAPTER PROPERTY
PROPERTY

<u>PROPERTY</u>		<u>Year ()</u>	<u>Year ()</u>	<u>Year ()</u>	<u>Year ()</u>
Charter	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Bylaws	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Minute Book	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Banner	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Gavel	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Podium	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Project Equipment	(a)	_____	_____	_____	_____
	(b)	_____	_____	_____	_____
Manual for Chapter Operations	#1	(a)	_____	_____	_____
	#2	(a)	_____	_____	_____
	#3	(a)	_____	_____	_____
	#4	(a)	_____	_____	_____
	#5	(a)	_____	_____	_____
	#6	(a)	_____	_____	_____
	#7	(a)	_____	_____	_____
		(a)	_____	_____	_____

(a) Name of individual responsible for custody of the item.

(b) Location, if normally kept at a fixed place.

CHAPTER-ARCHIVES CHECKLIST

CHAPTER: _____
CHAPTER HISTORIAN: _____
DATE: _____

- INSTRUCTIONS:** Gather the material, study it, categorize it and identify it, and protect it.
- a. *Materials should be stored in good environmental conditions.*
 - b. *The Chapter should know where the files are located.*

Storing the records is an important task because displays and histories can be created from them.

LOCATION OF ARCHIVES: (Name of person, company name (If pertinent), address and phone.)

Name: _____
Company Name: _____
Street: _____
City, State, Zip: _____
Phone: _____
Email: _____

Fax: _____

CHAPTER RECORDS CATEGORIZED: YES MISSING

CHAPTER ANNUAL CRC REPORT.....	_____	_____
ROSTER.....	_____	_____
MINUTES OF BOARD MEETINGS.....	_____	_____
MINUTES OF CHAPTER MEETINGS.....	_____	_____
TREASURER'S REPORT.....	_____	_____
NEWSLETTERS.....	_____	_____
PRESS CLIPPINGS.....	_____	_____
SIGNIFICANT CORRESPONDENCE.....	_____	_____
PHOTOS OF EVENTS.....	_____	_____
OTHER:(list)_____	_____	_____
_____	_____	_____
_____	_____	_____

MAIL SHEET TO: Regional Historian
Name _____ TEL: _____
Address _____ FAX: _____

PHOTO OF GOLD RIBBON



PHOTO OF GOLD RIBBON and CERTIFICATE



FURTHER HISTORICAL RECOMMENDATIONS AND GUIDES

(Credit for this information is given to the “*Georgia Department of Archives & History*”.)

1. Traditionally, history has been the story of government, an official record of how our political leaders, generals, bureaucrats, and businesspersons built modern society. But official history is not the whole picture. What about the average citizen and his story, his relationship to the government, to his job and community, to members of his family? Where in our history books do we read about the life of “the people” in whose name and for whose welfare the whole apparatus of government exists? Basically nowhere.
2. Realizing the need for more balance in our history, archivists have redoubled their efforts to locate, identify, and make available for research records which contain information about the lives and work of citizens in their communities.
3. A major thrust of this information-gathering project is directed towards voluntary organizations. The records of civic groups, professional clubs, and cultural societies, and records of their officers and members are the sources which document community life. Archivists are vitally interested in your records, in helping your organization keep good records and preserve them as important sources of information about the mainstream of American life.

Officers and types of historical records they may create:

<u>Officer</u>	<u>Records Created or Cared For</u>
President	External correspondence, internal correspondence, agenda of chapter and board meetings
Vice-President	Program planning and related correspondence
Secretary	Internal correspondence, minutes of chapter and board meetings, lists of membership, officers, mailings
Treasurer	Fiscal records
Editor	Newsletter and press releases
Task Forces & Committees	Project files focused upon issues of continuing concern and single events

COLLECTING ARCHIVAL RECORDS

Records should be set up in a subject file for each year. The following are suggested categories and sub-categories. When records are passed down, the chapter historian should work with each year's officers. This would minimize the historian's workload.

1. **Correspondence (in and out)** – arranged by officer, then by correspondent, by date.

Sub-categories:

- a) External
- b) Internal

2. **Fiscal Records** – arranged by type of record, thereafter by date.

Types of records:

- a) Check register
- b) Cash journal
- c) Treasurer's report

3. **Publicity and Publications** – arranged alphabetically by type of material, then by date.

Types of materials:

- a) Newsletters
- b) Press releases
- c) Special event flyers, brochures, announcements
- d) Photographs and negatives (identified)
- e) Scrapbooks

4. **Minutes (preceded by agenda in each case)** – arranged by type of meeting (i.e. chapter, board), thereafter by date.

5. **Organizational Records** - Arranged alphabetically by types of record, thereafter by date. Care should be taken to update these materials as changes occur by adding new versions to the file.

Types of records:

- a) Constitution and by-laws
- b) Organizational charts identifying officers and chairpersons
- c) Statements of goals, policies, procedures
- d) Membership lists

COLLECTING ARCHIVAL RECORDS (cont'd.)

6. **Task Force/Committee Records** – arranged alphabetically by name of task force or committee then by issue, event or project.

Types of materials for each Issue/Event/Project:

- a) Plan of action, identifying purpose of action, desired objectives, division of labor in committee/task force.
- b) Correspondence (*in and out, internal and external*) connected with division of labor in committee/task force.
- c) Correspondence (*in and out, internal and external*) connected with project/event/issue.
- d) Working papers connected with execution of project/event/campaign.
- e) Publicity materials of all types.
- f) Evaluative reports on success of project/event/campaign.

COLLECTING ARCHIVAL RECORDS (cont'd.)

MAINTENANCE AND RETENTION OF FILES:

1. **Time and Interval:** The file is to be kept in yearly segments based upon the organization's election year.
2. **Schedule:** Hold in archivist/historian's custody for four years, then transfer to an archival repository.

Note:

- a) Materials from previous years which are still active should be transferred to current year's files (held by appropriate office) as they are needed. These transferred materials should not be returned to the old files. Materials such as mailing lists and membership lists should be copied for current files, **not** removed from previous year's sections. These procedures will allow full access to all materials of current interest while guaranteeing the gradual deactivation of the historical files.
- b) Files may be maintained in regular file folders in ordinary cardboard boxes, provided they are housed in a dry, temperate place.
- c) All photographs should be identified (who, what, when, where, and why) and placed in file folders. Take care not to mar surface of the picture. Negatives should be identified and kept in sleeves supplied by the film processor to prevent soil and scratching.

(See Appendix "J", pp. J1-J2.)

Oral History Association - Goals and Guidelines

The Oral History Association by unanimous approval adopted the following statement on November 25, 1968. This statement could serve as an operating creed for any oral history project.

ORAL HISTORY ASSOCIATION

GOALS and GUIDELINES

The Oral History Association recognized Oral History for what it is – a method of gathering a body of historical information in oral form usually on tape. Because the scholarly community is involved in both the production and use of oral history, the Association recognizes an opportunity and an obligation on the part of all concerned to make this type of historical source as authentic and useful as possible.

Guidelines for the Interviewee:

1. The person who is interviewed should be selected carefully and his wishes must govern the conduct of the interview.
2. Before undertaking a taped interview for the purpose stated above, the interviewee (or narrator) should be clear in his mind regarding mutual rights with respect to tapes and transcripts made from them. This includes such things as: seal privilege, literary rights, prior use, fiduciary relationships, the right to edit the tape transcriptions, and the right to determine whether the tape is to be disposed of or preserved.
3. It is important that the interviewee fully understand the project, and that in view of costs and effort involved, he assumes a willingness to give useful information on the subject being pursued.

Guidelines for the Interviewer:

1. It should be the objective of the interviewer to gather information that will be of scholarly usefulness in the present and the future. The interviewer who is collecting oral history materials for his own individual research should always bear in mind this broader objective.

Oral History Association - Goals and Guidelines (cont)

2. In order to obtain a tape of maximum worth as a historical document, it is incumbent upon the interviewer to be thoroughly grounded in the background and experience of the person being interviewed, and, where appropriate and if at all feasible, to review the papers of the interviewee before conducting the interview. In conducting the interview an effort should be made to provide enough information to the interviewee to assist his recall.
3. It is important that all interviews be conducted in a spirit of objectivity and scholarly integrity and in accordance with stipulations agreed upon.

Guidelines for Sponsoring Institutions:

1. Subject to meeting the conditions as prescribed by interviewees, it will be the obligation of sponsoring institutions to prepare easily usable tapes and/or accurately typed transcriptions, and proper, complete information as needed to identify, index, and preserve such oral history records for use by the scholarly community, and to state clearly the provisions that govern their use.

GUIDELINES FOR ORAL HISTORY INTERVIEWS

1. Select the subject of the interview. Is it to be biographical, general or topical?
2. Select the interviewee. You will get suggestions for possible interviewees (narrators) from family, friends, civic groups, teachers, etc. Try to set priorities for who you interview so that your time is used as profitably as possible. If accuracy is important to your project, think about the reliability of the narrator you select. At the same time, don't be so selective that you ignore all but the leading citizens of your community and miss some of the most interesting and informative people.
3. Make initial contact. Initial contact should be made in person, if possible, by the individual who will actually be doing the interview. This is an opportunity to establish rapport with the narrator, but be careful to prevent this first meeting from turning into an interview session sans tape recorder. Keep the meeting brief and to the point.

This is the time to tell the interviewee about your project and why you want to interview him. Make sure he understands how the tapes of his interview will be used. You might also take this opportunity to get the release form signed or at least to tell him that you will be asking him to sign one. Also, point out that you will give him the opportunity to review the transcript of the tape to make changes or corrections as needed. You might use this time to show the person the taping equipment which you will use. You may also want to give the person a list of the kinds of questions you will ask, but use your judgment on this. Don't make the narrator feel compelled to stick to the topics on that list.

4. Pre-interview research. You will be able to ask better questions if you know as much as possible about the person being interviewed and about the subject of the interview. Be careful to use this information only to open questions, not to tell the interviewee your opinion.
5. Prepare a list of interview questions. A list of possible questions will help you move through the interview easily. It will also inspire confidence in beginning interviewers. Keep this list brief and remember to be flexible enough to add other questions or delete prepared ones as you get a feel for the interview. Remember this list is only to help, not direct or dominate you. And don't read the questions off of the sheet.

Appendix I

GUIDELINES FOR ORAL HISTORY INTERVIEWS (cont)

6. Be sure of your equipment. Practice with the recorder you will be using several times before going on the interview. Practice interviewing a friend or relative so that you will be comfortable in your new role. You might experiment with the pick-up of your microphone and the best place to position it for maximum effectiveness. Also, familiarize yourself with the recording time of the tapes you will be using. Check the recorder before each interview to make sure it is functioning properly, and carry spare tapes (and batteries if an electrical outlet is not available) and an extension cord.
7. Pre-interview points. When you arrive at the interview, chat casually with the interviewee for a few minutes while you set up your equipment. Treat the machine casually and make it as unobtrusive as possible so that you don't overwhelm or frighten the narrator with all of your technology. Make sure the recorder is easily visible for you to check the tape occasionally. If possible, cushion the recorder and microphone with a pillow, sweater, etc. to reduce vibrations. Try to minimize outside noises since the recorder will pick up sounds you might not even notice. Be especially alert to air conditioners, dishwashers, radios, T.V.s (even in the next room or back of the house).

Try to interview only one person at a time and make sure you talk with him in surroundings that will make the narrator feel as comfortable as possible. If the interview must be conducted at the school, try to keep away from a lecture-type atmosphere.

Before beginning the actual interview, record a brief introductory statement that states who you are talking with, the date, location, and subject of the interview.

During the interview ask questions that will allow the narrator to talk freely and at length. Avoid questions that call for one-word answers. ("What was it like to grow up in Athens in the 1920's?" rather than "Where were you born?") Be attentive, courteous, and responsive as the interview progresses. Nod your head and let the narrator know you are following him closely. If something is not clear to you, restate it in your own words and ask if that is what was meant. Also remember to check the tape occasionally so that you can turn it over at a convenient break in the conversation. Better to waste a little tape than to interrupt in mid-sentence for a mechanical adjustment.

GUIDELINES FOR ORAL HISTORY INTERVIEWS (cont)

Watch the time as the interview progresses, particularly with older people. Don't overtire the narrator. Keep the interview within a comfortable length of time such as 1-1 1/2 hours. You can always come back for subsequent time. If another interview is necessary, make arrangements for it before you leave.

8. After the interview. Be sure to label the tape(s) carefully with the names of the narrator and the interviewer, date, place, topics, etc. Before you leave, make sure that the release form is signed and remind the narrator that you will give him a copy of the transcript for review. Be sure to thank him for this time and cooperation.

TIPS FOR INTERVIEWERS (condensed from Willa Baum's *Oral History for the Local Historical Society*, pp. 32 – 35.)

1. An interview is not a dialogue but a chance for the narrator to tell "his" story. Ask questions that require more of an answer than "Yes" or "No" Start with "Why, How, Where, What kind of..."
2. Ask one question at a time and keep the questions brief.
3. Start with non-controversial questions. If necessary, they can be asked later when you know the narrator better.
4. Don't let periods of silence fluster you. Give your narrator a chance to think of what he wants to say before you hustle him along to the next question.
5. Don't worry if your questions are not beautifully phrased for posterity.
6. Don't interrupt a good story because you have thought of a question or because your narrator is straying from the planned questions.
7. If the narrator persists in talking about non-relevant things, get him back on the track with a few leading questions.
8. Do not challenge accounts you think are inaccurate. This could make the narrator angry or defensive.
9. Try to avoid "off the record" information. It won't do you any good.
10. Interviewing is one time when a negative approach can be effective. You might try, "Despite the mayor's reputation for good works, I hear he was a difficult man to work with. Did you find him so?" The narrator is going to supply useful information whether he challenges or defends your statement.
11. Don't use the interview to show off your own knowledge, vocabulary, charm, or other abilities. Good interviewers do not shine, only their interviews do.

GUIDELINES FOR ORAL HISTORY INTERVIEWS (cont)

SAMPLE RELEASE FORMS

Foxfire:

To: Foxfire Fund, Inc.
Rabun Gap, Georgia 30568

From:

I hereby give my permission to the Foxfire Fund, Inc. to publish both photographs of me and verbal or written information I have given that organization.

This material may be used with my full permission in either their magazine Foxfire; advertising brochures; or in the Foxfire book to be published by Doubleday Publishers in New York.

I understand that at no time will this material be used in a way slanderous or detrimental to my character.

Signed: _____

Date: _____

From *Oral History for the Local Historical Society* by Willa Baum:

I hereby give and grant to the Central City Historical Society as a donation for such scholarly and educational purposes as the Society shall determine the tape recordings and their contents listed below.

_____ (Name of Narrator)

_____ (Address of Narrator)

_____ (Name of Interviewer)

_____ (Address of Interviewer)

_____ (Date of Agreement)

_____ (Subject of tape (s))

From *Oral History: From Tape to Type* by Cullom Davis, Kathryn Back, and Kay MacLean:

I hereby release all rights, title, or interest in and to all or any part of my tape recorded memoirs to Tri-County Historical Society, subject to the following stipulations:

_____ (Interviewee) (Place) _____

_____ (Interviewer) (Date) _____

(for Tri-County Historical Society)

Handling, Care, and Storage of Historic and Archival Materials

Digital Archives

There are several options to store electronic media, including a number of for free or for fee commercial services. Options for storage include, but are not limited to the following:

1. Removable storage media such as CDs, thumb drives, or DVDs. The drawback is that removable storage media can deteriorate, be corrupted, and become obsolete in a very short period of time. It can also be misplaced or lost.
2. Files hosted by an individual on servers located in a business, in a server farm, or owned by the individual. The drawback is access is limited to the one person.
3. Cloud services, such as Google Drive, Microsoft OneDrive and Dropbox and others. Many of these may offer a free trial to use for a limited time. There could be charges for these services and any decision should be based on a thorough investigation into storage limits, rules and restrictions imposed by the service.

Documents, Records, Photographs

ASHRAE members are not trained archivists so what are simple and reasonably priced practical methods for historic preservation?

Proper preservation methods must be followed to ensure long term survivability of historic materials. Consider the following:

1. What you are preserving. Different methods and materials are needed depending on the nature of the item are trying to preserve.
2. What are you using to preserve the items? Some storage materials are dangerous for long term storage, resulting in irreparable harm.
3. Consider the environment you are storing items in. Extremes of temperature and humidity as well as ultraviolet light must be avoided.
4. What about retrieval of the items? Can they be easily accessed?

5. Who will be responsible for the storage and retention of the items? How are you keeping track of historical items and their location? If something happens to the person responsible for storage what happens to the items.

How to store items safely, simply and inexpensively – Quick Guide

Put the items in zipper type polyethylene bags. These are widely available at supermarkets, etc. And/or you can use “sheet protectors” as sold at office supply stores. These can be stored loose or in a 3-ring binder. Store the items where it won’t get too hot, cold or humid. See below for more specific information.

Preservation of paper items

Pay attention to what you will use to house or cover paper items. Most often used are plastic products. Not all plastic is safe for preservation.

1. Avoid using any type of vinyl (also called PVC or polyvinyl chloride). Vinyl is not safe because it often contains softeners that can leach and ruin whatever is stored in contact. Also vinyl degrades over time releasing hydrogen chloride. For these reasons, no trained archivist uses vinyl of any kind. Caution: many vinyl sleeves, etc are improperly advertised as safe. (There is an easy test to perform to see if a plastic contains PVC called the Beilstein Test.)
2. Common plastics that are safe to use are polyethylene, polypropylene, polystyrene and Plexiglas®. Thus the commonly seen poly bags are usually safe to use. Many of the “sheet protectors” sold at office supply stores are made of polypropylene, thus safe. (avoid sheet protectors made of vinyl)
3. The safest plastic, used most often by archivists, is polyethylene terephthalate, commonly called Mylar® or polyester or PET or PETG. It is stiffer than polyethylene or polypropylene. Sleeves made of this plastic are available from archival supply houses.
4. Do not use common steel staples or paper clips. Stainless steel staples and clips are available from archival supply houses. Don’t use rubber bands – they contain sulfur.

Older paper items (generally mid 1850's and later) are usually acidic pulp paper, causing yellowing and brittleness over time. They will continue to deteriorate. Early 1800's items were usually printed on rag paper that tends to be more stable.

Much modern paper, after the 1980's, is acid free. So one possible preservation method for yellowing brittle items is to make a good photocopy on acid free paper. This method is particularly useful for newspaper items since newsprint rapidly deteriorates.

Archival supply houses sell inexpensive "Ph pens" that can be used to test paper.

Re-copying historic materials is often not practical so the best that you can do is store the material in the safe plastics mentioned above in reasonable environmental conditions.

Preservation of photographs and slides

Most old photographs encountered are Black & White with their negatives. These are reasonably stable over time as long as they are stored out of contact with vinyl plastics, acidic paper or cardboard, light, high temperature and high humidity. Sensible storage is in safe plastic or acid free paper sleeves. Black and White slides can be stored the same way.

Color photos, negatives and slides tend to fade over time. Avoiding light and high temperatures mitigates fading but will not entirely stop it. Longer term preservation involves converting to a digital image.

1. Don't write on the back of photographs with ink—felt tip, ball point, or liquid ink in a pen. Don't rubber stamp them. Inks are acidic and may contain sulfur. It is safe to use a pencil.
2. Don't use rubber cement or glue to mount prints.
3. Don't use rubber bands around groups of prints, color slides, negatives, or to hold film on a reel.
4. Don't store photos flat in stacks or loosely in boxes. The weight may cause them to stick together. The lack of support in a box will cause curling.

5. Be cautious of photo albums – many are not safe since they use acidic paper and/or vinyl. A safer method is to use individual photo storage pages made of polypropylene or polyethylene in three-ring binders.

Archival Supply Houses

Archival Products
PO Box 1413
Des Moines, IA 50306
800-526-5640
www.archival.com

University Products, Inc.
517 Main Street
Holyoke, MA 01040
Tel. (413) 532-3372 or 800-628-1912
www.archivalsuppliers.com

TALAS
330 Morgan Avenue
Brooklyn, New York 11211
Tel. (212) 219-0735
www.talasonline.com

Guidelines for:
CHAPTER HISTORIAN'S
CRC WORKSHOP REFERENCE MATERIALS

REFERENCE MATERIALS

- A. Names, Addresses, Phone and Email Addresses of Regional Historian and Chapter Historians in the region.
- B. Regional Historian's yearly report.
- C. Upcoming year's Presidential Newsletter (PAOE).
- D. Chapter Historian's Duties
- E. The GOLD RIBBON AWARD - definition and guidelines.
- F. Leadership Recall defined.
- G. LOU FLAGG AWARD – definition and guidelines.
- H. Chapter Historical Report. (Method chapters can report PAOE activity.)
- I. PAOE Reporting-Date Schedule.
- J. Chapter-Archives Checklist. (See Appendix "C", p.C1.)
- K. Summary of the past year's History PAOE points for each chapter in the region.

The above guidelines are the fundamental elements for the HANDBOOK. Listed below are other materials that may be included:

- 1. Examples of local interest.
- 2. Sample GOLD RIBBON AWARD submissions.
- 3. Newsletter Articles.
- 4. Excerpts from the "Historian's Guide".
- 5. Other materials deemed appropriate by Regional Historian.

HISTORY OF PERSON

A person you feel is important enough to write about will probably already have a biography. If the person is alive, an interview is your best bet. If the person is deceased, try to find someone who knew the person.

This activity is similar to the **Leadership Recall** Interview at times, but differs, because it will be added to the Chapter history as a GOLD RIBBON AWARD entry. It must be presented in written form.

GUIDELINES FOR INTERVIEWING:

1. Select the person carefully. His or her wishes must govern the conduct of the interview.
2. Before taping an interview, be sure to consider the legal rights of the person.
3. Be sure the person understands the project.
4. Gather information that will be of usefulness now and later.
5. Be informed about the subject and person being interviewed.
6. Tape interview:
 - a. Have a list of questions.
 - b. Allow free input from person.
7. Have person tape own comments.
8. Have person furnish written comments.
9. After the interview:
 - a. Label the tape carefully with:
 1. Name of person interviewed.
 2. Name of interviewer
 3. Date, place and topic of interview.
 - b. Have the release form signed.
 - c. Offer person copy of the transcript for review.
 - d. Thank him/her for time and cooperation.
10. Edit comments:
 - a. Contact person for missing information.
 - b. Let person read and correct edited version.
11. Create final version.
12. Mail copies to: Regional Historian, the person interviewed, and other interested parties, if necessary.

HISTORY OF A COMPANY

Search for a company, such as an engineering firm, a contractor, a manufacturer's agent, or a manufacturer in your area that has a significant story to tell.

To those Chapters that do not have a manufacturing company in their chapter area, you can use an old time heating, refrigerating and air-conditioning company that was unique in the HVAC&R field.

Many successful large firms have developed some material which they may use in their marketing brochures. However, **do not copy what they wrote about themselves**. This is a start, but you've got to find people within the organization, or retired, to get a good picture of the history of the company or products.

Asking for help in assembling your material from a principal in the firm or a retired partner would be beneficial.

It should be strongly emphasized that this is a historical rather than a marketing effort.

- Try to keep your document to a reasonable length.
- To enhance the presentation, photocopies of old photos or pictures of the company building and examples of their product which mark advances in their business.

HISTORIES OF EQUIPMENT AND SYSTEMS

This can be difficult, as you may find an old and/or unique system, but records are gone. However, if you know or find out about an old system and mention it to an engineer, architect, or contractor, all of a sudden, bits and pieces of information start coming.

Assembling information on old equipment and systems is like putting together an elaborate puzzle that has more than half the pieces missing. In spite of this, projects of this nature have come forward.

Illustrations and/or photos enhance the presentation, and the write-up need not be a dissertation.

HISTORY OF SIGNIFICANT ARTIFACTS

Webster's Dictionary defines an **ARTIFACT** as: "any object made by human work".

The history of an object created or invented by some local person in the HVAC&R field which contributed to the progress of the industry is a topic that would be of historical value.

HISTORY OF SIGNIFICANT SITE

The history of a building with historical significance, preferably one on the historic registry, that demonstrates innovation in design of the HVAC equipment, whether rehabilitation of the structure or new significant system in restoration.

LEADERSHIP VOICES INTERVIEW QUESTIONS

A list of questions should be given to the person to study before the interview.

The following are some questions for general areas to be covered.

1. Would you give a brief biographical sketch of your life. (Place of birth, family size, early schooling, higher education, employment background outside of the HVAC industry, current family—spouse, children.)
2. What attracted you to engineering and/or the HVAC industry?
3. What was your first job in the HVAC industry and where did it lead?
4. Describe the industry at that time. What were the challenges that you and your colleagues were facing?
5. How and when did you get started in ASHRAE?
6. What was your ASHRAE chapter and/or regional and Society experience?
7. What were the major issues facing the industry at that time?
8. How was ASHRAE interacting with the public?
9. On what ASHRAE committees did you serve?
10. What people stand out as influences on you?
11. What events changed ASHRAE?
12. What events changed the industry?
13. What has ASHRAE meant to the industry's growth?
14. What advice would you give to a young person entering the HVAC field?
15. Did any humorous events take place during your association with ASHRAE?
16. What other interests and/or hobbies do you have?
17. Any other comments you would like to make?

To make the interview most comfortable for you, please feel free to add-to, re-fashion or delete any of these questions. THANK YOU!

LOU FLAGG HISTORICAL AWARD

The Lou Flagg Historical Award recognizes the vital role historians play in identifying and preserving the accomplishments of its members and the industry. It is presented at the Society annual meeting to the individual who prepares the most outstanding historical presentation nominated during the current society year. Nominations may be submitted yearly from each region. The nominations must be submitted to Society headquarters by December 1 of the current Society year for consideration. Presentations in electronic format are required. Note: In order to be eligible for the Lou Flagg Award, the presentation must have already received a Gold Ribbon Award.

The person who prepares the presentation that receives the most points from the nominations submitted and is considered of a quality acceptable for the award, as judged by the Historical committee, shall be recommended to the Honors and Awards Committee to be the recipient of the award. Criteria for determining the award recipient are as follows:

Historical Significance	35 points
Quality of Presentation	25points
Innovation	20 points
Photographs	20 points

Historical Significance: The presentation may be on a person, company, project, event, system or object invented or created that is of historic value or significantly contributed to the advancement of the HVAC&R industry. The relevance of the historical value or significance shall be clearly addressed.

Innovation: The depth to which the individual went, during the information gathering process, to locate and to identify the information should be emphasized. Projects should describe the facts pertaining to the preparation of the article.

Photographs: The utilization of photos or illustrations in the submittal should enhance the presentation. All photos should be identified (who, what, when, where and why).

Quality of Presentation: Presentation should be logical, concise and effective with significant features clearly highlighted. It should have simple to read system schematics or charts and easy to follow series of photos. A presentation in electronic format is required.

TIMELINE

- **Start with the date of the Chapter Charter**
- **Record First Meeting date and location**
- **Record Chapter Officers and chairs if available**
- **Record special meetings, seminars and events**
- **Add dates and location of any CRC's hosted**
- **Add dates and location of any Annual or Winter Society Meetings hosted**
- **Add any DRC's from chapter and/or Presidential Members.**
- **Add significant photos of officers and events.**

Format should be Excel or Word or software readily available to make additions.

This Time Line will assist in creating a Chapter History Book.

The “HOW TO” Guide to researching HVAC&R History (adapted from “The ASHRAE Historians Newsletter” April 2016)

Researching Industry History

Accuracy is the most important component.

The most accurate record is to be found in the trade press, that is, the various magazines, journals or newspapers featuring or exclusively devoted to our industry. This includes technical society journals and conference proceedings. (see a partial list at the end of this guide). These sources provide a continuous record of industry practice and new products where you can not only find and date innovations but also see industry trends, lasting as well as temporary. Trade publications typically have sections on new products and many older issues have sections on new patents and most have product advertisements. You will be surprised at the information you can find in the trade press and industry/society journals. If you are looking for information on individuals or portraits look in these sources and don't forget obituaries. These publications are found in libraries or some can be accessed digitally online from sources such as Google or Hathitrust. Also keep in mind that earlier trade publications separated all the advertising in a separate, continuous section, often with independent page numbers. Unfortunately many libraries stripped the advertising sections when binding the publications. However some libraries retained the advertisements and these would be most useful for research. Trade publications do not exist prior to about 1865. Before that time industry information is found in more general publications covering science, industry and industrial arts, etc.

Another good source of information is engineering textbooks. These are usually a good way to view the best engineering practice in use at the date of publishing. Also the *ASHVE Guide* and the *Refrigerating Data Book*.

Next in accuracy are company catalogs and other literature. However, often these sources are undated. Old company literature can sometimes be accessed from the company itself if still in business. It can also be found in libraries, particularly those with trade catalog collections such as the Smithsonian Institution, Canadian Centre for Architecture or Hagley Library. Some of this material is being digitized for on line availability. Company catalogs can also be found in bound groupings published for builders and architects such as Sweets. If you want to purchase original company literature, look in bookstores and online sources such as Ebay.

In many cases the least accurate source is the personal recollections of industry participants. Accurate memory naturally fades with time. Although an “old timer” may have a good general recollection of projects and milestones they participated in, actual dates may or may not be accurate, so cross check the information if you can.

When using general histories in articles or books it is a good idea to go to the original information sources that the author used if they are given. Authors do make mistakes in

repeating or interpreting original sources. Also, by going to the original sources you may find a lot of additional information the author didn't use as well as visual material and also other trails of information you can follow.

Researching Society history

Many ASHRAE chapters have their own newsletters and some go back a long time. If your chapter has an archive of them, that is a source for local history. But where do you find older Chapter history, or Regional or Society history? The only way is to access Society official publications. We are all familiar with the *ASHRAE Journal* and *ASHRAE Insights*. These are recent publications that can be used for chapter, regional or Society history. The *ASHRAE Journal* dates back to 1959. Looking for history before 1959? You have to access the official publications of ASHRAE's prior Societies: American Society of Refrigerating Engineers and American Society of Heating and Air Conditioning Engineers/American Society of Heating and Ventilating Engineers.

American Society of Refrigerating Engineers

Society and chapter information is found in: *Transactions of the American Society of Refrigerating Engineers* 1905 -1913; *ASRE Journal* 1914-1921 and *Refrigerating Engineering* 1922-1958.

American Society of Heating and Air Conditioning Engineers / American Society of Heating and Ventilating Engineers

Society and chapter information is found in: *Transactions of the American Society of Heating and Ventilating Engineers* 1895-1958; *ASHVE Journal* 1915-1929 and the "Journal Section" of *Heating, Piping and Air Conditioning* 1929-1958. The trade publication *Heating and Ventilating Magazine* between 1905 and 1929 also reported on ASHVE meetings, etc.

Pre-Society History

If you want to look at the history that led to the formation of ASHVE and ASRE you would have to access the trade publications that carried articles about the organizing meetings. For ASHVE look at issues of *Heating and Ventilation* for 1893-1895. For ASRE look at issues of *Cold Storage and Ice Trade Journal* as well as *Ice and Refrigeration* for 1904 and 1905.

Finding source material

How do you locate material such as trade publications, textbooks or catalogs? The obvious is to do an internet search. A specific search can be done on WorldCat (www.worldcat.org) to locate libraries having what you are looking for in their collections. You can search using general subject or specific authors or titles. Search starting from the specific to the general, but search over the entire spectrum to be sure you don't miss something. Many trade publications and journals provided yearly indexes that are usually found at the beginning of bound volumes of the publications. Indexes to ASHRAE publications are posted on the ASHRAE website or search for "ASHRAE Indexes." When you find useful information you may be able to directly access it digitally, but in many cases you will either have to arrange and pay for a copy of the information or go the source to look at it and take notes or make

your own copies. Many libraries will do interlibrary loans of books to your local library. Most libraries will not loan out journals and magazines.

Don't forget ASHRAE which has a very good collection of industry and society information that you can access. A list is on the ASHRAE website.

Information pertaining to specific out of business manufacturers and their products can sometimes be found in collections of company records donated to libraries and institutions. An internet search using the manufacturer name can turn these up.

Use out of the box thinking about where information may be located. For example, if you are researching early heating industry history, look beyond heating. Heating involves boilers with pipes and furnaces with ducts and before that, stoves. So you look at plumbing and sheet metal trade publications where you will find a lot on early heating technology, engineering and products. Don't forget about end users of what you are researching. For example if you are looking at early air conditioning history additional information can be found in the trade publications covering the textile, candy manufacturing hotel or motion picture industry and so on. Early refrigeration industry information is in the publications of its end users such as brewing, ice and cold storage.

Also keep in mind changing terminology over time. You won't find the term "air conditioning" anywhere before it was first used in 1905, but both industrial process and comfort air conditioning did exist before then – they just called it refrigeration or cooling. HVAC&R engineering wasn't recognized as a separate discipline before the 1880's. Instead it was considered mechanical engineering and earlier still, civil engineering. And so you find HVAC&R information in mechanical and civil engineering society publications in the 1800's and before.

Visual Material

Locating visual material can be one of the most difficult parts of historical research. Using the research ideas above you may find information, but it may or may not have visuals embedded in it and you won't know unless you look at it. Reproduction of the original visuals is possible with varied technology. Access the original if you can and reproduce it in the fewest steps possible. Original photographs or negatives, especially black and white, yield good copies. Earlier printed publications used very high quality black and white line art and engraved plates and these yield very sharp copies. Later publications used screened illustrations which, if scanned, should be done using a de-screen setting. You can get good reproductions using a simple digital camera and most libraries will allow you to take photos of their material. Copy machines of today usually provide good copies. Keep in mind that every time a visual is duplicated there is a loss of quality. Images of machinery and people should be scanned or photographed at 400 to 600 dpi resolution. 200 dpi is sufficient for drawings or other line art.

Credits and copyrights

Be sure to record your sources of your research. When writing articles or research papers credit the source of your information. Information crediting is not only honesty, but it helps future researchers who access your research and want to look further into your sources. Also, some providers of information or visuals require a credit for using their information.

Be aware that some information you use may be copy written and if you quote or reproduce a visual from it you may need permission to use the quote or visual. Generally, older material and visuals either were not copy written or the copyright is expired or the publication has ceased. In those cases you can use the material freely, but remember to credit the source. Advertising material and catalogs are usually not copy written.

How much time and effort can you put into it?

We are all busy with our business and personal lives and good historical research can take a lot of time. When you get into it you will find that one trail leads to another. You will have to decide how much time and effort you can afford to give to the project.

Partial list of trade press and journal source material

Here is a list of publications devoted to our industry, starting with the earliest in the 1860's. This list is not comprehensive and is of American publications. Some publications are repeated in the list with later name changes. Many other countries have similar publications also, available at universities and libraries. Use WorldCat to find them.

American Artisan
The Metal Worker
Ice Trade Journal
Domestic Engineering
Ice and Refrigeration
Heating and Ventilation
The Metal Worker, Plumber and Steamfitter
ASHVE Transactions
Cold
Cold Storage
ASRE Transactions
Ice
Cold Storage and Ice Trade Journal
The Heating and Ventilating Magazine
ASRE Journal
Engineering Review
Refrigerating World
Refrigerating Engineering
ASHVE Journal
Heating and Ventilating
Sheet Metal Worker

Refrigeration
The Aerologist
Electric Refrigeration News
Heating, Piping and Air Conditioning
Automatic Heat and Air Conditioning
Heating and Air Conditioning Contractor
Refrigeration Service Engineer
Air Conditioning and Refrigeration News
Air Conditioning, Heating and Ventilating
Industrial Refrigeration
Refrigeration Industry
Refrigeration Service and Contracting
Refrigeration Abstracts
Commercial Refrigeration and Air Conditioning
ASHRAE Journal
Air Conditioning, Heating and Refrigerating News

Q4

ASHRAE HVAC&R Historical Landmark & Milestone Programs

MONDAY, OCTOBER 22, 2018

Purpose

ASHRAE's HVAC&R Industry Historical Landmarks and Milestones program recognizes places where significant contributions to the heating, air conditioning, ventilation, and refrigeration (HVAC&R) industries have occurred including inventions, equipment and system installations, technology development, and outstanding innovation in HVAC&R industry. The ASHRAE Historical Committee maintains the program, recommends proposal to ASHRAE Board of Directors for final Vote.

The Sponsor of the ASHRAE HVAC&R Historical Landmarks and Milestones Industry will supply a plaque for display to the Owner of a selected landmark. ASHRAE will create a unique webpage explaining the significance of the selected landmark. Finally, ASHRAE will add the landmark to the roster of ASHRAE HVAC&R Historical Landmarks and Milestones.

This program intends to:

Increase public awareness of the heating, air conditioning, ventilation, and refrigeration (HVAC&R) industry

Increase public awareness of ASHRAE and the contributions of its members to the general public

Provide ASHRAE members with historical awareness of their profession

Provide a comprehensive list of ASHRAE HVAC&R landmarks, milestones, and locations where significant achievements have been made

Increase awareness of significant ASHRAE industry developments

Encourage grassroots participation and general public awareness of the ASHRAE HVAC&R Landmarks and Milestones program

Criteria

The following criteria must be satisfied before consideration:

The HVAC&R landmark or milestone must be at least 25 years old

The HVAC&R landmark or milestone must be of regional or global importance, neither size nor technical complexity of design or construction in and of itself is a criteria

The HVAC&R landmark or milestone must represent a significant facet of ASHRAE HVAC&R engineering history, but does not have to be designed or constructed by a ASHRAE HVAC&R engineer

The HVAC&R site landmark or milestone should be generally be open to viewing by the public, however security and/or site remoteness or safety requirements may restrict access.

Landmarks or milestones must be nominated by ASHRAE members, ASHRAE chapters, or ASHRAE regions

The plaque is printed in English; costs to produce plaques in other languages are at the sponsor's expense;

Translation to other languages must be validated by a third-party professional translator at the sponsor's expense

Sponsor must obtain permission must obtain permission from landmark or milestone where plaque is to be placed

Sponsor must plan a dedication ceremony and document the event (photographs required; video recommended)

Sponsor must provide 60-70 word citation to be printed on the plaque

Time required

Plaque citation

Plaque location

Plaque dedication ceremony

The nominator should plan and coordinate the dedication ceremony. A photographer and/or videographer should document the ceremony.

The landmark or milestone sponsor must provide a report to ASHRAE's Historical Committee within 30 days of the ceremony that includes:

Date and location of ceremony

Exact location of the plaque

Approximate number of attendees

Names of attending dignitaries

Press releases

Media coverage (links to articles/video and copies preferred)

Materials created for the dedication ceremony, i.e. brochures and invitations

Photographs and/or video of the ceremony

The ASHRAE Sponsoring Entity must submit to the appropriate person

Plaque costs

Nomination form (website preferred)