

THE HERB SOCIETY OF AMERICA, INC.

ARCHIVES GUIDELINES

Reviewed May 2008, **Revised April 2016**

The purpose of the archives is to preserve The Herb Society of America **by retaining** records and information of permanent historical value, and to serve as an educational resource for members and administrative staff.

I. General Appraisal Guidelines

For records to qualify as "archival material" they should provide ~~significant~~ **compelling** evidence (evidential or historical value) of the HSA's organization, its functions, policies, major decisions, procedures, operations, and significant activities.

Records that have little or no historical value per se may be included in the archive if they document legal obligations and protect legal rights, or establish fiscal responsibility and accountability. Unless these records have inherent historical value, they can, in many cases, be disposed of after a specified number of years. In a like manner, it might be necessary to temporarily retain other non-current records (of little or no historical value) for potential support of specific ongoing administrative affairs of The Society. The Society's executive director, attorney and accountant can best determine such records and their retention schedules.

II. Other Appraisal Factors

In addition to their evidential (~~historical~~) value, records can also be evaluated using these four criteria:

- Aesthetic or artistic value (i.e., do the records have exceptional or unusual visual quality)
- Age (anything prior to 1990 has potential value due to its age alone)
- Value for use in exhibits (this especially includes 3-dimensional objects)
- Scarcity ("one of a kind" quality; intrinsic value)

III. Records to Generally Exclude

- Duplicates (unless they meet one of the other appraisal factors listed above)
- Routine memoranda or correspondence (e.g. "housekeeping" items)
- Sub-committee minutes, records, etc. Subcommittee minutes or records considered to have potential historical value should be retained for a specified period of years (e.g. six years) and then evaluated for their value as permanent records.
- Drafts of published materials or reports. Generally, the aim of the archive is to retain records that *represent an end product*. It is usually not necessary, for example, to retain drafts of articles, which appear in *The Herbarist*, or drafts of reports. An exception to this might be report drafts that contain significant annotations (handwritten notes in the margins) that shed light on a researched subject, or have scholarly value. Drafts of membership lists need not be retained if a printed directory is extant, unless the list contains important additional information not in the directory.

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IV. Types of records that might have permanent value

- Publications
- Chief administrative officer files (i.e. president, executive director)
- Committee reports/minutes (do not include subcommittees)
- News clippings
- Memoranda
- Financial statements/reports
- Photographs and albums
- Directories
- Biographical information
- Legal information (deeds, wills, bequests, agreements, etc.)
- Promotional materials
- Monographs (authored by members)
- Artifacts (3-dimensional objects)
- Awards information
- Drawings
- Correspondence
- Press releases
- Pamphlets
- Plans/maps/blueprints
- Scrapbooks
- Speeches
- Testimonials
- Diaries/journals
- Video/audio tapes

V. An example of record types maintained by units

Records will vary from unit to unit, but here are some general guidelines to use in maintaining a unit archive:

- No office copies of documents not generated by that unit
- Newsletters and other publications generated by that unit
- News clippings that document unit activities or profile unit members
- Brochures
- Articles on herb subjects written by or about unit members
- Minutes or reports of unit administrative meetings (at highest level)
- Constitution and by-laws
- Financial reports (aggregate reports, summaries)
- Annual membership directories/programs/year books/agendas, etc.
- Promotional materials for unit activities - representative samples

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- Photographs. (Representative samples only. If there are a number of pictures taken of an event, only a sampling is usually necessary to capture "the gist" of the activity or object.)
- Artifacts (3-dimensional objects). Retain if old, scarce, visually unique - anything that you can imagine in an exhibit. Examples: handcrafted items, special publications, herbal novelties, etc.
- Correspondence received and sent that document unit's functions, policies, major decisions, procedures, and activities.

What to send to HSA

The Society Archive welcomes any material that documents the policies, ~~and~~ activities, **and members** of the separate units, **such as a pdf copy of the unit newsletters, publications, promotional materials, newspaper and magazine articles, photographs, and writings. These materials may** ~~Most units currently mail a copy of their newsletters; some units additionally send other material documenting their activities. Such materials can be sent as copies or in duplicate or, in cases where the unit no longer wishes to retain the records, as original files.~~

~~The HSA is especially interested in material that documents a unit's activities and members (i.e. its "personality"). Such materials most commonly consist of newsletters, publications, promotional material, newspaper and magazine articles, sample photographs and writings.~~