

---

---

# PRESERVING YOUR ORGANIZATION'S RECORDS

---

---

North Dakota's history is written by its citizens. It can be found in the records of businesses and state and local governments. It can be found in peoples' letters, diaries, and scrapbooks, where they describe the joys and hardships of their lives. It also can be found within the records of the many organizations that shape each community's identity, whether the organizations are of an educational, religious, charitable, or recreational nature.

The records of your organization are important. They provide an understanding of your organization's history and its role within the larger context of state and regional history. This pamphlet encourages you to preserve your organization's historical records and aims to provide the information for you to do so.

## WHY KEEP HISTORY?

*We keep records because of our deep emotional and intellectual commitment to the values of the civilization of which we are a part, and to what our ancestors did and to what we hope our children will do.* Herman Kahn, 1944

We all feel the need for maintaining a community's memory. A community is a product of its past experiences. What's unique about your town, about your organization, or about your family? What makes us who we are and distinguishes us from others? History gives us a sense of continuity and a sense of identity. In essence, it is who we are and where we have been.

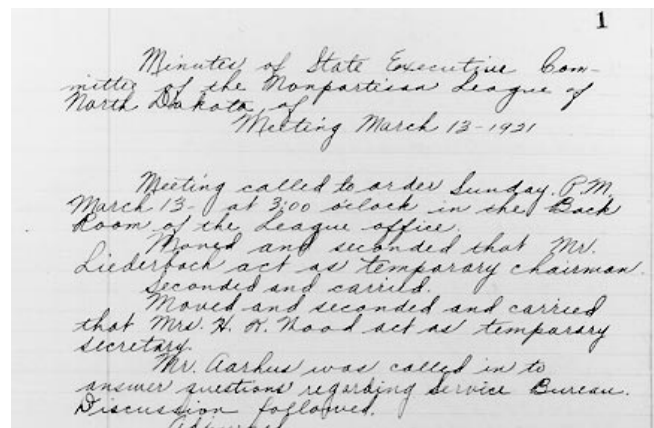
Records are the true source of a community's memory. An original record is impartial in the sense that it chronicles an event as it occurs. A history book is about a historical event and is subject to the author's bias. However, records are **of** the event. They may be interpreted differently by different people, but the information in the

records themselves remains the same. Without records, we can never be certain of our history. Without records, we must take someone else's word for our past.

## WHAT SHOULD BE KEPT?

Maintaining your organization's documentary heritage may seem a daunting task, but with proper knowledge of what to keep and how and where to keep it, the task can be managed more easily. This section will provide some guidelines toward that end.

An organization should retain some records permanently and others temporarily. Most organizations will have more temporary records than permanent ones.



## Permanent Records of Lasting Value

### General Records

- Governing documents, such as the charter, constitution, and bylaws, including all amendments and revisions
- Minutes of meetings, agendas, supporting papers
- Membership lists or directories
- Financial records of origin, such as general ledgers and journals, budgets
- Procedures manuals and handbooks
- Building or property records, such as

- deeds, surveys, architectural drawings
- Legal documents, such as contracts, insurance policies
- Publications, such as organizational histories, anniversary publications, bulletins, newsletters, yearbooks, programs
- Audiovisual materials, such as photographs, audio or video cassettes, or films of organizational activities
- Publicity, such as newspaper clippings about the organization or its members
- Memorabilia, such as awards and products used for fund raising

### **Board and Committee Records**

- Rosters of trustees, officers, committee chairs, and members
- Minutes of meetings, agendas, supporting papers
- Officers' files, including annual reports, correspondence, budget reports
- Committee files, including special project reports, special studies, convention/conference materials, annual reports, correspondence, budget reports

### **Temporary Records**

These generally may be discarded when current use ceases, unless they are the only records left.

- Acknowledgments
- Applications
- Ballots
- Bank statements
- Bills
- Budget working papers
- Canceled checks
- Invoices
- Draft versions of publications, articles, speeches
- Maps unrelated to the organization's property
- Meeting announcements
- Payroll notices
- Receipts
- Reservations and confirmations
- Routine correspondence and memoranda
- Sales literature
- Schedules

- Tickets
- Time books
- Vouchers

### **HOW TO KEEP RECORDS**

Every organization should assign someone the responsibility to systematically maintain its current records and preserve those records with historical significance. An organization may include a statement about the importance of historical records preservation directly in its constitution or bylaws. The responsibility may naturally fall to the organization's historian, but a clear charge also may be given to the secretary, the president or director, or someone with a keen interest in the organization's history.

The historian's responsibilities should include:

- developing policies and procedures for maintaining and preserving the records.
- contacting affiliated state, regional, or national organizations to determine their established records policies and procedures.
- selecting an appropriate storage space or facility.
- sorting and organizing the records.



- dating all items and identifying photographs and audio-visuals materials as to who, what, where, and when.
- requesting permanent copies of all records that are frequently updated, such as membership lists, contributor lists.

### **WHERE TO KEEP RECORDS**

An organization should select a suitable place to store and preserve its records. One of several

choices may be appropriate to ensure long term preservation:

- create and maintain its own archives.
- transfer permanent records to the archives of its parent organization.
- donate records to an established archives in the state.

An organization should consider several factors when deciding where to house its records. The most important are space, staffing, and access to the records. Records of historical significance should be housed in an area that is secure and that is relatively free from environmental changes throughout the year. Areas that are more ideal are those in which people live and work, not hot attics, potentially wet basements, or uninsulated garages.

An organization that maintains its own building should evaluate potential areas to house its records, keeping in mind the issues of adequate space, security, and reasonable climate control. Likewise, the historian should address these same issues if an organization has no building. Records should be stored in a suitable area of the member's home or business.

Access to the records for current use and future reference should be provided. Records should be organized, filed, and inventories or indexes created for easy access and retrieval.

If an organization decides to donate its records to a parent organization or established archives, the issue of access is just as important. An appraisal should be made so that an organization maintains current operating records and then preserves those historical records it will not access more than once a year. An organization should be comfortable with the archives' location, hours, and copying policies.

## **RECORDS OF INACTIVE ORGANIZATIONS**

The records created by organizations which no longer exist are also valuable historical documents and need to be preserved. Should you have

such records or know where such records are located, you are encouraged to select a suitable place to store and preserve them. This may include donating the records to the parent organization or to an established archives.

Whether your organization decides to create its own archives or donate them to another archives, it is hoped that this pamphlet has provided basic information to make an informed decision. Your organization's records contain important historical documents. Their care and preservation matter to all North Dakota citizens!



If your organization has questions or seeks guidance regarding records preservation, it may contact one of the state's institutions with trained archivists:

Elwyn B. Robinson Department of Special Collections  
Chester Fritz Library  
Box 9000  
University of North Dakota  
Grand Forks, ND 58202-9000  
701-777-4625

North Dakota Institute for Regional Studies  
North Dakota State University Library  
P.O. Box 5599  
Fargo, ND 58105-5599  
701-231-8914

State Archives, State Historical Society of North Dakota  
North Dakota Heritage Center  
612 East Boulevard  
Bismarck, ND 58505-0830  
701-328-2668



## NORTH DAKOTA STATE HISTORICAL RECORDS ADVISORY BOARD

The North Dakota State Historical Records Advisory Board was established in 1976, with a coordinator and board members appointed by the governor. The board reviews grant applications made to the National Historical Publications and Records Commission (NHPRC); serves as the state liaison with the programs of NHPRC; and plans for the development and improvement of historical records programs in the state and encourages coordination of efforts to preserve historical records.

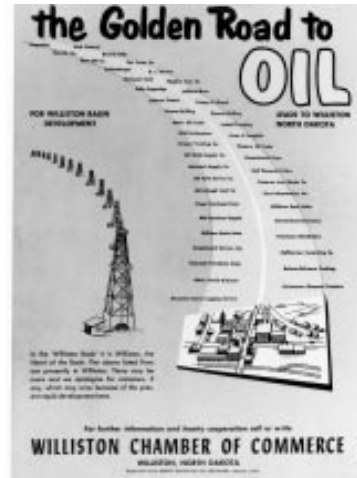
The SHRAB serves as an advisory and coordinating body. It does not acquire, preserve, or provide access to historical records. The goals and activities the board advocates can only be achieved by the combined efforts of many organizations and individuals interested in the history of North Dakota.

Following is the list of current members of the North Dakota State Historical Records Advisory Board:

- Gerald Newborg, Bismarck. State Archivist, State Historical Society of North Dakota, and North Dakota State Historical Records Advisory Board, Coordinator
- John Bye, Fargo. University Archivist and Archivist, Institute for Regional Studies, North Dakota State

University

- Marilyn Hudson, Parshall. Director, Three Tribes Museum, Inc., New Town
- Mark Langemo, Grand Forks. Ed.D., CRM. Professor, College of Business and Public Administration, University of North Dakota
- Becky Lingle, Bismarck. Associate Director of Records Management, Information Services Division, State of North Dakota.
- Sandy Slater, Grand Forks. Head, Elwyn B. Robinson Department of Special Collections, Chester Fritz Library, University of North Dakota.
- Dean Strinden, Williston. M.D., retired.
- Frank Vyzralek, Bismarck. Great Plains Research, Bismarck. Former North Dakota State Archivist.



North Dakota State Historical Records Advisory Board  
North Dakota Heritage Center  
612 East Boulevard Avenue  
Bismarck, ND 58505-0830