



City of North Port

City Commission Policy – Historical Archive Policy

Policy No: 2021-06

Resolution No: 2021-R-13

Approval Date: April 13, 2021

I. STATEMENT OF POLICY

- A. To help document the municipal government's history, the City will create and maintain an archive of historical documents. The City will accept, arrange, and preserve historical documents donated to and created by the City in a historical archive. The City's historical archive will be available to the public for examination as provided by Florida's Public Records Law and should be used to promote and encourage research into the history of the municipal government.
- B. This policy provides directives addressing the scope of collection, collection procedure, and maintenance for the City's historical archive.

II. DEFINITIONS

- A. Custodian of the Historical Archive. The City Clerk is designated as the custodian of the City's historical archive.
- B. Historical Documents. Records that document the municipal government's history.
- C. Retention Schedules. The retention requirements for public records as set by the Florida Department of State's General Records Schedules.
- D. Records Management Liaison Officer. The City's coordinator of the records program as designated in writing by the City to the Florida Department of State, division of library and information services.

III. SCOPE OF COLLECTION

- A. Scope of Collection. The following examples are public records the City designates as historical documents, and that will be reviewed by the Custodian of the Historical Archive for inclusion in the City's historical archive beyond the time set for their destruction in the Retention Schedules. Where there is a question as to the meaning of a term contained in these examples, the term will be as defined in the State of Florida General Records Schedule GS1-SL for State and Local Government Agencies.

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| 1. Annexation Records | 7. Cemetery Records |
| 2. Annual Reports: Governing Body | 8. Certificate of Occupancy: Commercial |
| 3. Architectural/Building Plans:
Commercial | 9. Charters/Amendments/Bylaws/
Constitutions |
| 4. Arson Investigations: Capital/Life Felony | 10. Comprehensive Master Plans: Adopted |
| 5. Bond Resolutions/Ordinances | 11. Copyright Release/Authorization
Documentation |
| 6. Budget Records: Approved Annual | |

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| 12. Criminal Investigative Records:
Capital/Life Felony | 26. Original Maps |
| 13. Criminal Investigative Records: Missing
Persons/Runaway Cases | 27. Official Meeting Minutes |
| 14. Donation Records | 28. National Flood Insurance Program
Records: Community Rating System |
| 15. Endowments/Bequests/Trust Fund
Records | 29. National Flood Insurance Program
Records: Flood Mitigation Assistance
Program Records |
| 16. Engineering Records: Infrastructure | 30. National Flood Insurance Program
Records: Floodplain Construction
Authorization Records |
| 17. Expenditure Plans: Capital
Improvement | 31. Opinions: Legal (Agency Attorney) |
| 18. Final Orders Records | 32. Ordinances |
| 19. Financial History Summary Records | 33. Records Disposition Documentation |
| 20. Geographic Information System
Snapshots: Historical | 34. Records Retention Schedules: Agency
Specific |
| 21. Hazardous Waste Facility Operating
Records | 35. Resolutions |
| 22. Historical Designation Records | 36. Storage Tank Records |
| 23. Inspection/Maintenance Records:
Bridges | 37. Subdivision Plans |
| 24. Land Development and Planning Project
Files | 38. Surveys: Aerial |
| 25. Land Development and Planning Studies
and Reports | 39. Utility Records: Operational Startup |
| | 40. Zoning Variance Records |

B. The Custodian of the Historical Archive may also include in the City's historical archive, beyond the time set for their destruction in the Retention Schedules, a public record that:

1. Has an intrinsic value due to its physical form, uniqueness, or other factor arising out of its creation or use;
2. Chronicles policy formation, program development, or administration of the City;
3. Has an extended and unbroken time span offering uniform and comparable information on the operations and programs of the City;
4. Chronicles the historical development of the City, of the community, or of its people; or
5. Provides an accurate, understandable, and accessible source of information to researchers.

C. There are certain documents that, although not public records, add to the history of the municipal government, or have historical value worthy of transfer into the public record. The following are examples of documents the Custodian of the Historical Archive may transfer into the public record and include in the City's historical archive.

1. A historical document drafted by a public official of the City, or that complements, supports, or adds value to a record already in the historical archive, or that is related to an under-documented event in the history of the municipal government.

2. A document that has intrinsic value related to the history of the municipal government due to its physical form, uniqueness, or other factor arising out of its creation or use.
 3. A document that provides an accurate, understandable, and accessible source of information to researchers related to the history of the municipal government.
 4. A collection of physical/printed photographic images that document the operations of the municipal government.
 5. Personal or private correspondence, a diary, manuscript, photograph, film, post card, painting, portrait, or business record that reflects on or depicts a significant event impacting the municipal government.
 6. A newspaper, journal, magazine, book, newsletter, or calendar that documents or reports on a significant event impacting the municipal government.
- D. Selection for Archive. Great care must be exercised when selecting items for inclusion in the historical archive due to space and resource limitations. The Custodian of the Historical Archive must establish set standards and criteria to be used when evaluating items for inclusion. In addition to the inclusion of public records designated for “permanent” retention under the Retention Schedules, the standards and criteria should take into consideration and anticipate the information that may be needed by researchers, historians, citizens, and others in order to provide space for only the most valuable or unique items of historical value.

IV. PROCEDURE

- A. Release and Intake Form. Every document submitted for inclusion in the City’s historical archive must be accompanied by an executed release form and Historical Archive Intake Form. If a document has been appraised, and if available, a copy of the appraisal should be submitted as well.
- B. Custodian Review. The Custodian of the Historical Archive must review each document submitted for inclusion in the City’s historical archive. No document can be transferred into the City’s historical archive until approved for inclusion by the Custodian of the Historical Archive.
- C. Archive Management. All documents in the City’s historical archive must be identified and organized in a searchable format. Every reasonable effort must be made to protect the City’s historical archive from physical calamity and decay, both in terms of environment and use.
 1. Access. Documents in the historical archive will be provided for inspection only under the supervision of the City Clerk or designee. The City Clerk or designee must locate, retrieve, and refile all documents for and following review. A supervisory fee may be applied, as provided in Florida’s public records law.
 2. Prohibited Items. At no time is food, drink, or any other liquid allowed in the same room as a document being reviewed or inspected from the historical archive.

3. Removal Prohibited. No document from the historical archive may be removed from the building where it is housed without the express prior written permission of the Custodian of the Historical Archive. Written permission must, at a minimum, identify the name and contact information of the person removing the document, the document removed, and the amount of time removal is authorized.
 4. Reproduction. Documents in the historical archive may be reproduced for a fee, as provided in Florida's public records law.
- D. Removal from Historical Archive. If the Records Management Liaison Officer and the Custodian of the Historical Archive agree that a document no longer belongs in the historical archive, the document can be removed and, once the applicable Retention Schedule has been met, destroyed pursuant to the City's process for the destruction of public records.
- E. Appraisal. The City is not a qualified appraiser and cannot independently appraise items donated to determine a fair market value. Anyone desiring to have an item appraised before it is transferred into the historical archive must do so independently and without City assistance, either financially or otherwise. Any appraiser hired by a donor must be a "qualified appraiser" as that term is defined by the Internal Revenue Service (IRS), with no connection to the donor or the City. Where an appraisal exists, a copy of the appraisal must be provided to the City upon the acceptance of the item appraised.
- F. Ownership and Copyright. All documents become or remain City property and a public record once transferred into the historical archive. All rights, title, and interest in and to all documents, including but not limited to unpublished materials and literary property rights, belong to the City once transferred into the historical archive. Researchers are liable for any copyright infringement relating to their use of the material.

V. PROGRAM MAINTENANCE

The Custodian of the Historical Archive must regularly review this policy and the City's historical archive program to ensure continued efficiency and compliance with established policies and procedures. The Custodian of the Historical Archive must ensure that, where applicable and relevant, City staff receives training on this policy and the purpose of the City's historical archive program.

Oral History Release Form

Knowing the historical value of this interview, I, _____ give permission to the City of North Port to use the resulting information at its discretion for research and educational purposes.

I understand that these memories will be recorded and transcribed and that I will be given an opportunity to edit and approve them. I understand that this information may become part of the City of North Port's Archive and the resulting information could be used in a variety of ways.

For my services I will receive a printed copy of the final transcript.

Signature: _____

Date: _____

Historical Archive Intake Form

Knowing the historical value of this interview, I, _____ hereby give to the City of North Port the below described document(s) to be housed in the City of North Port Archive.

I understand donations to the Archive are considered outright and unrestricted donations to be used in the best interest of the City of North Port. Donations become the sole and irrevocable property of the City of North Port Archive.

Item: _____

Signature: _____

Date: _____