

## The Art of Herbal Formulation

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As herbalists, we are offered the unique privilege to work with plants in many ways: cultivating, harvesting, researching, tasting, and medicine making are a few that come to mind. One of my favorite ways to work with plants is herbal formulation. This is our opportunity to assess the temperaments of people and plants, integrating what we observe with our personal experiences, research, and gut instinct to create a medicine that will be most effective. There are many factors to consider when you are formulating; it is a lifelong practice and opportunity to learn and grow at whatever level of herbalism you pursue.

A strong understanding of materia medica is important for success in herbal formulation. One must consider not just actions and indications of a specific herb, but safety issues, pharmacognosy, and sustainability as well. What family does this plant belong to? Which plant part(s) are considered most active? What is the best medicinal preparation to use? Recognizing and understanding each herb's many qualities will help to refine your skills as a formulator. Taking the time to truly develop an intimacy with a plant leads to a multi-layered experience of its medicine.

There are several different approaches to herbal formulation, and as you develop a personal practice, you will find the way that feels best for you. Some practitioners prefer a more formula or protocol-based approach, using *this* specific formula to treat *that* particular condition. This works particularly well when treating acute conditions. Other folks focus heavily on constituents and pharmacology, using what has been gleaned from scientific studies to guide construction of an effective formula. There is also the "herbal overkill/kitchen sink" approach, where several herbs that have similar actions are all combined. Herbal formulas constructed in this manner can feel clunky and overwhelming, and tend to be limited in their scope. A deeper understanding of materia medica will help you to differentiate between herbs with the same actions and make more graceful choices.

Questions to ask yourself when formulating with herbs:

- What is the goal of this formula? What am I expecting it to do?
- Do secondary systems need support?
- What herbs are you using and how are they extracted? How well do the herbs mix?
- How will the medicine taste? Will compliance be an issue? A client is much more likely to take a medicine that tastes good. Don't let this override the medicinal nature of the formula, though. A digestive bitter formula should still taste bitter.
- Will the formula be effective at the recommended dosage? Are there any low-dose botanicals in the formula? You will need to formulate within the recommended safe dosage range. Be aware of any other cautions or contraindications related to the herbs you choose.
- Is this recommendation affordable for the client? Is accessibility an issue? Herbal teas and powders are much less expensive than tinctures. Choosing exotic and hard-to-find herbs can also be cost-prohibitive. Remember that a client may need to take a formula for several months to see significant results, so be sure to consider the long-term cost of your recommended treatment.

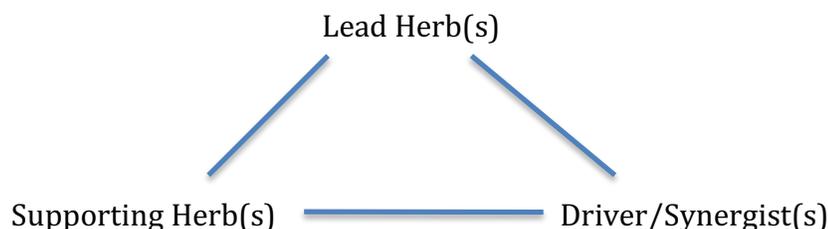
**Simpling** is the process of using one herb for a specific person. Ironically, this can be much more complex than giving an herb for each symptom. Simpling requires an intimate knowledge of your materia medica, as well as the skill, insight, and instinct to refine an herbal formula to a single herb. It means finding **the one herb** that will best meet the needs of an individual by synthesizing the information on an herb **and** a person, and then making a match—which is where that multi-layered experience of a plant comes in handy.

Sometimes using two or more herbs simultaneously is more desirable, though. This process is called **compounding**, and it allows you to fit a formula to a person using a number of plants to address the stresses on the client's health. When compounded, herbs have the ability to influence certain qualities and personality traits in other herbs. After selecting a primary herb/goal of the formula, you can choose other herbs to support, enhance, or direct the primary herb in its action. This is where formulation becomes more subjective and unique to each individual herbalist—and more like an herbal work of art. When effectively combined, herbs have the ability to:

- Increase/amplify actions and effectiveness. Example: Dandelion and Burdock; Skullcap and Oats; Hawthorn and Linden.
- Minimize or diminish side effects of strong herbs. Example: Lomatium and Dandelion root.
- Direct the herb to a particular body system. Example: Marshmallow root with:
  - Uva-ursi for urinary tract support.
  - Burdock for digestive support.
  - Osha for respiratory support.
- Stimulate or diffuse, moving the herbs around the body more effectively. Example: most pungent herbs including Ginger, Cayenne, Black Pepper. Also Prickly Ash and Rosemary.
- Balance Energetics such as cool/hot; dry/moist. Example: Gentian and Ginger; Peppermint and Marshmallow.

While there is no hard and fast rule about the number of plants that are used, it's important to remember to focus on effectiveness. Herbs are selected with thoughtfulness, intention, and purpose. Remember: **the best herb is the gentlest one that works**. Better to start on the softer end of the spectrum and work your way up to the more powerful plants if necessary, although some situations will obviously call for more serious medicine.

Consider all of the client's symptoms, as well as what all of the herbs do individually and synergistically. This generally leads to the construction of several lists—symptoms and problems, appropriate herbal actions, and herbs that seem to be the best fit. You can select more desirable herbs and eliminate others, see if any of your choices address more than one action or symptom, and identify any redundancies. Some herbs may be more appropriate as dietary recommendations. Comparing and refining the lists will help you to begin to see which are your lead, supporting, and driver/synergist herbs.



**Lead herb(s)** should directly address the primary goals of your formula. They are usually about 50-60% of a formula, unless they are low-dose, in which case you use much less.

**Supporting herb(s)** are about 30-40% of a formula. They help to support the actions of the lead herbs: by synergizing or increasing the effects of lead herbs, supporting secondary body systems, balancing energetics, etc. They may also be nourishing or tonic herbs.

**Drivers** are a much smaller portion of the formula, generally 5-10% or less. They have a more diffusive action and tend to stimulate the circulatory stimulants or peripheral vasodilators. They may also stimulate the lymph system. Some examples include Ginger, Cayenne, Prickly Ash, Rosemary, Ginkgo.

**Synergists** help to blend the actions and/or flavors in a formula, and are usually 5-10%. They often contain saponins, which help to blend constituents and prevent precipitation. Examples include Licorice and herbs in the Araliaceae (Ginseng) family.

Sometimes you can't fix every symptom with an herbal formula. Other times it's hard to pinpoint exactly what the root cause of the client's health problems are. This is when it's good to focus on the minimal amount of intervention that will have a lasting effect, and try to find the combination of herbs that is best for the client at that moment. Healing, especially of chronic and complex issues, is often an unwinding process. If you fix one symptom/problem, what other symptoms/problems might the client's body be able to repair?

When working with chronic and complex issues, you should see some change within 2-3 weeks, at which time you can meet with the client again and modify the formula if needed. Schedule a meeting every 4-6 weeks thereafter to check on progress; you may want to tweak the formula or re-formulate entirely. Substantial improvement should be seen within 2-3 months. Remind the client (and yourself) to be patient and positive: the body needs time and nourishment to heal.

The biggest mistake you can make when formulating is not fully knowing your materia medica. Use herbs that you feel comfortable and familiar with, and always feel safe in what you are offering to clients. Never be afraid to refer out to another practitioner if you don't feel qualified to handle a situation. Knowing the limits in your scope of practice is critical to your success as an herbalist. It shows great character to acknowledge your strengths and weaknesses, and will help you build lasting relationships with your clients based on trust and honesty.

Herbal formulas are often just one aspect of a well-rounded treatment plan; healthy food choices, exercise, sleep, and meditation are other important pieces of the puzzle that will maximize the effectiveness of any formula you recommend. Consider external applications, too: herbal and mineral baths (including hand and foot baths), massage, and external aromatherapy are other great supportive healing modalities.

Seek out and study other people's formulas, and you will better understand what herbs work well together and for what conditions. As you become more comfortable with the way you *think* through compounding and formulation, you will find that you can begin to *feel* your way through the process. Spend time researching, tasting, and working with the herbs you use most often and feel called to experience. The plants are always teaching us; there is always more to learn, and focusing on deepening your relationship with your medicines will make you a better herbalist and formulator.

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