

Regional Fraternity of Eastern Canada
Guidelines for Maintaining OFS Records and Archival Material
For the Local Fraternity

1. Background:

- a) The preservation and retention of official documents, Registers, minutes and other historical materials are of vital importance for all OFS fraternities at the local, regional, national and international levels of our Order. These guidelines will assist fraternities in this task and responsibility. Issues addressed in these guidelines include:
- Materials of historical and archival significance
 - Where to place archival materials
 - Decisions as to the significance of archival material
 - Who is responsible for maintaining these records
 - Archiving of digital materials
- b) The most important documents to protect are:
- i. The **Declaration/Certificate for the Canonical Establishment of the Fraternity** and the fraternity **Register** which includes the names of all persons who have been received into the Order and date of their profession unless “dates” applies to some other significant event in the life of the professed member.
 - ii. **Binder(s)** include the approved Minutes of the Council meetings, fraternity meetings, annual financial statements and correspondence with the local Bishop and/or major Franciscan superiors, elective chapter minutes and photos.
 - iii. Each binder should include the materials for a three year period, the period of an elected Council. *(It is not necessary to include all correspondence, although some fraternities may choose to do so. Only correspondence or materials of historical interest, such as a poster, newspaper article, newsletters or program of a special event/celebration should be added.)*

2. Archive Location:

a. Hardcopy Documents

- i. The Fraternity Register and active hardcopy documents (those of the current Council) are maintained in a safe location by the fraternity secretary. All members of Council should be aware of the location of the fraternity’s archives.
- ii. At the end of each three year mandate, the Secretary should file the previous three years’ documents into a binder and place them in the local fraternity’s archives.
- iii. It is critical that these archives be stored in a secure place such as a locked cabinet located at the local Franciscan friary, parish office or meeting locale where the fraternity regularly meets. Under no circumstances should the archives be stored in a fraternity member’s home.

b. Digital Material

- i. Digital material should be archived on some type of USB flash or hard drive device and kept in a secure place as noted above. Consider having two devices and rotate them with updated material on a regular basis.
- ii. Caution: Using the Cloud i.e. Dropbox or Google Drive may have too great a security risk associated with it, so it is recommended that this be avoided for archival storage. Flash/hard drives have large storage capacities, are low cost, have a life expectancy of

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10 years, are unaffected by magnetic interference, surface scratches and have no moving parts.

- iii. The secretary is normally responsible for placing digital files into appropriate digital folders and archiving these files onto the flash/hard storage drives for safe keeping. In most cases, documents and folders should be constructed as **read only** so that the contents of the folder cannot be changed or modified.

3. Additional Points:

- a. Folders (hard copy or digital) could include:
 - o Minutes
 - o Treasury Reports
 - o Correspondence
 - o Copies of fraternity newsletter
 - o Other Reports (retreats, special meetings)
 - o Photos (events, celebrations)
- b. As an added measure of archival assurance, hard copies of all important digital documents should be made and filed in the binders with the other hardcopy material. Important historical information such as *Certificates of Canonical Establishment* and the *Fraternity Register* should be copied and sent for safe keeping in the Regional Archives in Montreal. This can be coordinated through your Area Regional Vice-Minister or Regional Minister.
- c. The treasury calendar year runs from January to December and many fraternities end their 3 - Year elected anniversary term on a different month other than December. In the final year of a council's mandate the old council will need to coordinate with the new council to ensure there are no gaps in the archival treasury records either for the binder or digital storage.
- d. Some fraternities may prefer to digitize (scan) their old records for storage. Fraternities are encouraged to scan their important documents, e.g. Certificate of Canonical Establishment and the Fraternity Register with updates. Moving forward fraternities should employ both hard-copy archival materials as well as digital archival materials.
- e. Digitally archived files and documents should be reviewed to ensure the data is kept in sync with **current technologies**, i.e. opened, updated and saved on the latest software and technology. The suggestion is to do this every 3 years to coincide with Council's elected term. If a fraternity wishes to store digital archival material in the Regional Archives, it would remain their responsibility to insure this data is kept in sync with current technologies as noted above.