

**Regional Fraternity of Eastern Canada**  
**Guidelines for Maintaining OFS Records and Archival Material**  
**For Regional 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. It is the responsibility of the Regional Fraternity to maintain a Regional Archives.
- b. These Regional Archives are ideally located with the Franciscan friars serving in the region.
- c. Regional Archives should include:
  - o important regional documents,
  - o Regional Council minutes,
  - o Minutes of Elective Chapters,
  - o approved Financial Statements,
  - o correspondence (with bishops, Franciscan superiors, National fraternity)
  - o copies of regional newsletters,
  - o conference agenda and reports
  - o special event/celebration
  - o other regional records which the Council believes are of historical significance.

**2. Archive Locations**

**a. Hardcopy Documents**

- i. The records and active hardcopy documents (those of the current Council) are maintained by the Regional Secretary and placed at the Regional Archives located at the friary of ***the Franciscans of Eastern Canada***, 5750 Rosemont Boulevard, Montreal.
- ii. At the end of each three year mandate, the Council through the secretary, should file the previous three years' documents into a binder and place them in the archives.
- iii. An indexing regime has been established in the archives and this must be maintained.

**b. Digital Material**

- i. Digital material should be archived in some type of USB flash/hard drive device and kept secure in the Regional Archives and updated on a regular basis. Consider having two devices and rotate them with updated material.
- ii. In most cases, documents and folders should be constructed as **read only** so that the contents of the folder cannot be changed or modified.
- iii. As an added measure of archival assurance, hard copies of all important documents should be made and filed in the binders with the other hardcopy material.

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**3. Additional Points:**

- a. Folders (hard copy or digital) could include:
- Regional Council Minutes and Minutes of Elective Chapters
  - Treasury Reports
  - Correspondence (with bishops, Franciscan superiors, National fraternity)
  - Special Reports
  - Copies of regional newsletters
  - Conference agendas
  - Events/Celebration/Photos
  - Local Fraternity
- + Folders of the local fraternity could include **critical data** that is forwarded to the Region for its records.
- + It remains the responsibility of each local Fraternity to maintain its own digital archives as indicated in the guidelines for local fraternities. Access to their digital archives (flash/hard drive) held in the Regional Archives must be accessed through the designate of the Regional Council.
- b. Digitally archived files and documents should be reviewed to ensure the data is kept in sync with current software and technologies. The suggestion is to do this every 3 years to coincide with Council's elected terms.
- c. The Regional Treasury calendar year runs from January to December and Regional Council's 3-Year elected mandate normally ends on a different month other than December. In the final year of the council's mandate the old council will need to coordinate with the new council to ensure there are no gaps in the archival treasury material either for the binder or digital storage.
- d. The Regional Council should ensure that it has in its archives important historical information from each local fraternity such as *Certificates of Canonical Establishment* and the *Fraternity Register*.
- e. It will not be the responsibility of the Regional Council to update a local fraternity's digital archival material stored in the Regional Archives, to insure its data is kept in sync with current technologies as noted elsewhere. The responsibility remains with the local fraternity.
- f. Access to the Regional Archives will be controlled by the Regional Council or its appointed designate. Local fraternities are required to access the Regional Archives through the Regional Council. Under no circumstance are the Regional Archive key(s) to be loaned out, and access to the archives must be made by a designate of the Regional Council.