



**Guideline: 1**  
**Creation Date: May 31, 2020**  
**Revision Date:**  
**Subject: Archives**

## **Guidelines for Regional Fraternity Archives**

### **Essential are issues of:**

- A. Introduction
- B. Duties of the Archivist
- C. Assessing Material- What to Keep/ What Not to Keep
- D. Location of Archives
- E. Organization of Files
- F. Preservation Challenges and Solutions
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### **A. Introduction**

Important documents, photos and artifacts that are pertinent to the Regional Fraternity need to be kept in a central place that is both environmentally safe and secure. By assessing, storing and preserving regional records correctly, the archivist is extending the life expectancy of those documents. It needs to be stressed that only records and documents pertaining to the Regional Fraternity need to be kept in the regional fraternity archives. Local fraternities should keep their records in their own archive area.

### **B. Duties of the Archivist**

The archivist is appointed for a specific amount of time by the Regional Executive Council (REC). In most cases the term is 3 years to be renewed for an unspecified period of time. Regional funding should ensure that the archivist is compensated for supplies and mileage.

The archivist:

- should have some experience as a secretary, historian, or have previous archival experience;
- should have good organizational skills as well as good writing skills;
- should have access to a computer and the ability to use the necessary computer programs.

The duties of a regional archivist are as follows:

1. to collect important records specific to the regional fraternity;
2. to assist in finding a suitable, secure place in which to store regional fraternity material;
3. to collect pertinent documents of early regional fraternity history;
4. to create a directory (catalog) of archival files;
5. to scan documents onto hard-drive as a back-up to paper copies;

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6. to store hard copy files alphabetically within folders in archival boxes or file cabinets;
7. to give updates, verbal or electronic, periodically to the Regional Executive Council;
8. to share important information at District Gatherings and/or annual Chapters;
9. to be available for consultation when needed to check documents.

### C. Assessing Material

1. Items that **NEED** to be saved (see page 5 for sample)

#### **Regional Fraternity Business:**

- Annual Reports sent to the National Executive Council (NEC)
- Chapter Agendas, Minutes, Special Programs
- Commissions/Committees - Reports and Activities
- Confidential Information - Letters, Documents
- De-activated Fraternity Records (e.g, ledger, final financial reports, final minutes, rosters, and newsletters)
- Regional Gatherings - Timetable for Planning; Agendas
- Document of Establishment (original) for the Regional Fraternity
- Documents of Establishment (copies) for local fraternities in the Regional Fraternity
- Election Results
- Executive Council Meetings- Agendas and Minutes
- Financial Reports, Bank Statements and Budgets (retain for at least 6 years)
- Letters of Appointments (Spiritual Assistants, Commissions, etc)
- Regional Fraternity History if one has been done
- Visitation Reports (Fraternal and Pastoral)

#### **From Local Fraternities:**

- Council Election Results
- Annual Fraternity Reports
- Membership Lists and Updates
- Visitation Reports (Fraternal and Pastoral)

#### **Publications:**

- Regional Newsletters/ Featured Newspaper Articles
- Brochures such as Vocational or Informational Pamphlets
- Photos of Regional Fraternity Events (include names, events and dates).

2. Items that **DO NOT** have to be saved

- Name badges from retreats, conferences or gatherings
- City maps, event tickets, airline tickets and boarding passes
- All brown corrugated cardboard should never be used
- Partially-eaten folders by mice and bugs
- Three-ring Binders (too bulky/ heavy)
- Mailing envelopes; Phone messages; Post-it notes
- Plastic bags; Paper bags
- Pamphlets or Prayer Cards from Non-Franciscan Saints

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- Paper Clips, Felt-Tip Pens, Rubber Bands; Straight Pins
- Spiral Notebooks (remove wire binding) and Report Covers with 3 metal prongs
- Posters of Speakers and Events from Parish or Diocese should not be kept.

### D. Location of Archives

Find a place that is clean, accessible and secure. A neutral place enables the archivist to process records (i.e. identifying and organizing files) as time permits. It should be a place where records can also be left undisturbed for a length of time. Storing Regional Fraternity archives in individual homes (home office or spare bedroom) should only be considered as a temporary solution. Once Regional Council members are “retired” from council positions, their records become the property of the Regional Fraternity.

1. Suggested locations for the regional fraternity archives: a local church storage area, a friary, convent, school library, or a commercial building. Be advised, a rental fee may be charged wherever it is located.
2. The selected location should have sturdy shelves; all boxes and/or filing cabinets should be clearly marked as “[Insert name of Fraternity]Regional Fraternity Material (Part of the National Fraternity of the Secular Franciscan Order in the United States) -Do Not Discard.” Include contact information for the regional and national fraternity on each box and filing cabinet.
3. Temperature (65-70 degrees), Humidity level (30-50%), and Light (limit exposure to fluorescent light; no direct sunlight- use blinds or curtains) are factors to consider.
4. Never store important records in a basement (possible flooding) or attic (temperature fluctuations).
5. Carpeting should be avoided in storage areas as it can absorb moisture easily.
6. The storage facility for the Regional Fraternity archives should be locked. Clearly mark the area with the name of the Regional Fraternity as well as the contact person. Keys should be available to both the archivist and owner of the storage facility. A key should also be given to a second person on the Regional Executive Council.
7. Archive material should not be checked out as one would a library book. Research should be done in the archive room and supervised by the archivist.

### E. Organization of Files

1. Organizing Papers. Two methods are described, but other methods or a combination of methods can work as well
  - a. Set up a Directory of Documents. After the contents of a box is examined and sorted according to topic (annual reports, confidential files, regional gatherings, visitations, etc.), documents are set into labeled file folders; these folders are arranged alphabetically into a box or file drawer.
  - b. Keep the collection “as is”. Regional Minister X, for example, sends his/her documents for the term served. The Archivist labels the box “Minister X’s files”, the contents are itemized and listed on the box (it would help if the individual files in this box would be arranged alphabetically, but some archivists maintain the collection should remain in the exact order it is received).

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2. Photograph Files: If these are included with the regional event or during Regional Minister X's term, the pictures (with names of people, events and dates) can be stored with the agenda/minutes of the event. It is best to put photos in clear archival sleeves to protect them.
3. Publication Files: Books and Publications should not be stored with papers and photographs. They should be stored on a sturdy bookshelf. Only material that pertains to the history of the Regional Fraternity should be kept.
4. Regional Fraternity Newsletters: Keep Regional Fraternity newsletters in a separate file, not in the main collection. Saving them on a CD or flash-drive is good, but still have one paper copy of each edition as a backup.

### **F. Preservation Challenges and Solutions**

1. Paper Documents:
  - a. Remove paper clips, pins, staples and rubber bands
  - b. Don't keep half-empty spiral notebooks; remove important pages and file
  - c. Do not use 3-ring binders; they take up space and are heavy
  - d. Straighten creases and bent corners
  - e. Rolled documents need to be unrolled and stored flat
  - f. Do not use felt-tip markers to label files; a soft pencil is best
  - g. Watch for signs of bugs, dampness and mold
  - h. Use only archival boxes (bank boxes are good too); clearly label each
  - i. Do not over-fill file folders
  - j. Store materials at least 4 inches off the floor
  - k. Never display an original document; have a good copy made for any display
  - l. News Clippings are important because of their information; keep original and a photocopy
2. Photographs
  - a. Avoid storing in damp basements or hot attics
  - b. Handle photos by the edges, never touch the face of the photo
  - c. Never exhibit original photos, only copies
  - d. Identify all photos with name, date and event if available
  - e. Never use felt markers or ballpoint pens to identify photos
  - f. Store vertically.
3. CDs and Electronic Media: (hard copies are preferable but time-consuming to prepare)
  - a. Avoid temperature and relative humidity extremes
  - b. Never write with felt pens on the surface of disks or stick labels on their surface
  - c. Transcribe information off audio tapes
  - d. Store disks vertically.

### **G. Backup Copies**

Consider electronically scanning documents and storing on an external hard-drive. It's a big job, but it provides for remote access of those documents. Another method of storage and safe backup for the hard copies is to use online storage services (e.g. Google Drive, Microsoft OneDrive, etc). (Note: hard copies must be kept. Digital copies of records are only to be used as a backup.)

## H. Conclusion

This is a basic overview meant to get Regional Archivists started. It is best if the Regional Archivist takes it slowly and allows time to read the material as it arrives. This is a unique opportunity to learn the history of the Regional Fraternity. For guidance in handling unique circumstances or questions regarding cataloging, storage locations or preservation of materials, contact the National Archivist directly.

### Sample of Files Catalogued LaVerna Regional Fraternity Directory of Documents

1. Annual Regional Fraternity Reports to National
2. *Capuchin Tertiary* newsletter 1962-1964
3. Chapter Meetings - Agendas, Minutes, Programs
4. Commissions - Reports, Activities
5. Confidential Matters - Letters, Documents
6. De-activated Fraternities (old ledgers are separate)
7. Regional Gatherings - Timetables for planning, Agendas
8. Documents of Establishments (region & locals)
9. Elections (1988-1999)
10. Elections (2000- current)
11. Emerging Regional Fraternity Documents (from Fr. Ulric Buenning)
12. Financial Records - Annual Reports, Budgets, Bank Statements
13. FOCUS Regional Meetings
14. Formation and FUN Manual Material
15. *Franciscan Life* Newsletter
16. Fraternities' Annual Reports
17. Fraternity Histories
18. *LaVerna VISION* newsletter (1995- present)
19. Letters (1978-1999) Fr. Ulric, Marie Amore, etc.
20. Mission Statement/ Miscellaneous Forms
21. Photos and News Clips of Important People, Events
22. Priest Fraternities
23. REC Agendas, Minutes
24. Regional Fraternity Officers/ Job Descriptions
25. Regional Fraternity Guidelines
26. Retreat Endowment Fund
27. OFS Leadership Workshops
28. SA Appointments
29. Tertiary Province of St. Joseph, Capuchin
30. Visitations - Fraternal & Pastoral/ Guidelines
31. Vocation/ Information Brochures
32. Website Updates
33. YouFra and FYA
34. Transitus and Memorial Prayer Services
35. Franciscan Tunics (used in programs)/ Burial Garment