

Fraternity Document Retention Schedule

Archives are often thought of as -- and most of the time are -- stacks of old musty-smelling papers. But they are more than that. They are the important documents that should give future generations of Franciscans insight into the past events of your fraternity. It is apparent from the stack of papers we receive in one year that we should not keep everything. So what records should be kept?

High Priority Archives That Must Be Kept

- Record of canonical establishment of your fraternity
- Reception and profession register book
- Attendance records with dates of admission, transfers, deaths, etc.
- Minutes of the council and fraternity meetings
- Newsletters of your fraternity
- Treasurer's report: a detailed accounting of expenditures, not just the stubs from the checkbook
- Dismissals from the fraternity and related correspondence
- Constitutions, Rule, Statutes, Guidelines, specific changes or amendments
- Copies of annual reports and common fund activity sheets that you sent to the regional fraternity
- Miscellaneous records your fraternity feels are important to keep

Informative Archives: Items that will be helpful to identify past officers, spiritual assistants, members and events of the past

- A chronicle or scrapbook
- Pictures of past officers and spiritual assistants, all dated with names of people
- Action pictures of apostolates, retreats, social events and the like, all dated with names of people
- Pictures of newly professed and anniversary celebrants, all dated with names of people
- Articles along with pictures of important events
- Pictures of the church or your meeting place
- Publicity
- Samples of press releases that were sent to the media along with actual press coverage
- Other useful information about special events
- A detailed record of expenses connected with banquets, retreats, days of recollections, pilgrimages and the like because this will be a great aid for the new officers when planning future events

No Permanent Interest: Items that should probably be removed and discarded

- Thank you notes after acknowledgement
- Most correspondence of finished business which is usually not kept unless it deals with a confidential subject that is still open for discussion and decision by the Council or is supportive of financial activity needed by the Treasurer
- Old or outdated catalogs; those catalogs that are not actually being used

When in Doubt: The Council should be consulted if there is doubt about whether something should be kept or not. Items retained can be marked "File," "Keep," or something similar so they are easy to identify.

Records in Duplicate: If at all possible, duplicate records should be kept in two different locations in case of fire or the death of whoever keeps these records in your fraternity. A deceased member's family, not realizing their importance, may destroy fraternity records.

Clearly Mark All Records with the following inscription:

Important Documents -- Property of the Secular Franciscan Order
Contact: (your fraternity name, at least one contact name & phone number)