



## LEGION OF MARY RECORDS RETENTION POLICY AS DEFINED BY MIAMI REGIA

Recent discussions have revealed the need to define the policy of records retention. We have therefore undertaken to make this record for your use and our website so that all will know and follow it. Every good business these days has a written records retention policy, and it is no less necessary for the Legion of Mary than for other well-run organizations. --Bro. Charles Kane

### **PRAESIDIUM RECORDS:**

All the officer records should be maintained for three years plus the current year.

After the preparation of the annual report the records should be bundled together. When the next annual report is prepared the oldest of the records may be destroyed so you always have three years plus the current year.

### **COUNCIL RECORDS:**

The council records should be maintained indefinitely as long as the council is in existence.

“It does not matter that the council may be elevated to the next level etc., the minutes are kept from the beginning. From the council standpoint of the Visitation Report (Vice President keeps) and the Annual Report (Council Secretary keeps) are kept with that months Minutes so that the meeting can be reconstructed if necessary.

“Money from the secret bag of the council can be taken to purchase a simple filing cabinet to be kept in the place where the meeting is held or an officers home. Just make sure that the officer turns over the files and cabinet when their term is up. Remember the Legion will be around long after we are gone so if tidbits of information can be left for the future officers of a council I feel it is best.”—Sister Margaret

A discussion ensued about the Affiliation Forms. All councils should be using the Affiliation Forms to affiliate new praesidia, and they are permanent records. A copy can be obtained from your higher council or on their website.

“The Affiliation Form (Miami form PA) is the form that is made out when the praesidium has completed their probationary period and is presented at the council meeting. This is usually the first time that the praesidium has attended the council meeting since it is a meeting for officers. The Vice President of the council will use that form to "Affiliate" the praesidium, their name and the names of the officers that are being appointed. (As we have read in the Legion handbook that if we as a praesidium are not attached to a council then we are not officially in the Legion of Mary. Same goes for a council etc). There should be at the very least two officers that are being appointed. If there are less, then the praesidium should not be presented to the council. They should get another three to six months to see if they can strengthen by getting more members etc. This is the form that should be kept for as long as the praesidium is in existence.”

“A copy should be in the Presidents and Vice President's officers book of the praesidium and the Vice President's book of the directly attached council. This might seem redundant however there have been many times when a book of records or the entire set of officers books have been lost or destroyed and certain things are to be there.” — Sr. Margaret (Also send a copy to your higher council with the minutes—cek)

I recommend that the council should maintain a folder for each praesidium ever attached to it in which a copy of the affiliation form, the presidium's annual report, and special correspondence is kept. This, too, should be permanent, and can be kept in the file cabinet recommended above.—cek

31 January 2019