

Parish Archives and File Management Guide — Appendix 801A

Introduction

This guide is intended to provide direction for keeping parish files. It will assist parish secretaries and administrators with a methodology to organize parish files and ensure the permanent preservation of records of long-term value. This guide is meant to complement Policy No. 801 Parish Archives and File Management. It complies with canonical, legal and civil requirements governing records created or received by a parish.

Parish files consist of records that document the business, administrative, legal, spiritual, social and historic affairs of the parish. These records come in a variety of formats, including written correspondence, sacramental registers, paper or digital documents (Word or PDF), emails, photographs (print or digital), etc. Note that the list of record groups indicated in this guide is not exhaustive. Each parish will have records that are unique to the community and may not be indicated in the guide. Contact the archdiocesan Archivist for assistance.

Records may be divided into the following seven groups:

1. Administrative records

Records that facilitate the day to day operations and management of the parish. Some administrative records such as correspondence and reports are common to other functions, e.g. the Parish Pastoral Council and the parish cemetery will have their respective correspondence.

2. Councils and Committees

Records generated by the various councils and committees active in the parish and subject to change over time, e.g., Parish Pastoral Council, Finance Committee, Youth Ministry, Liturgy Committee, Men's Club, etc.

3. Financial

Records pertaining to the management of the financial resources and obligations of the parish.

4. Personnel

Records related to every employee or volunteer serving in the parish, strictly confidential, accessed only by designated staff with a legitimate purpose to access.

5. Property

Records pertaining to the management and administration of property and buildings associated with the parish, including construction, inspection, renovations, repairs and facility rental.

6. Sacramental

Records included in all sacramental registers (baptism, confirmation, marriage and burial); records filed in baptism or profession of faith permanent files, marriage files; permission letters and other information about sacraments administered by the parish. These records are strictly confidential, accessed only by the pastor, associate pastor, or designated staff with a legitimate purpose.

For details on access to sacramental information, see the following policies:
No. 822 Access to Sacramental Registers – Authorized Personnel
No. 823 Access to Sacramental Records – Authorized Persons
No. 824 Searches for Genealogical or Identification Purposes

7. Cemetery

Records that document the management and administration of a parish cemetery, including burial permits, financial records, correspondence, and maintenance information. Not all parishes will have records related to the management of cemeteries.

Retention and Disposition of Records

Not all records are meant for permanent retention. The Retention Schedule for Parish Files – Appendix 801B along with this guide are meant to help in assessing the period of time for keeping any given record, according to canonical, legal or civil requirements.

Selective Retention - when a retention period is reached, the records are disposed of according to the “disposition information” column of the Schedule.

Permanent Retention – records of a “permanent” nature will be integrated into the parish archives. In case of parish closure, see Policy No. 1100 Parish Twinned/Clustered or Merged.

Parish Archives

When records have finished their active phase and are ready to be transferred to the archives, the following steps are to be taken:

1. Remove metal paper clips, elastic bands, tape (where possible).
2. Re-house in acid-free file folders and place in acid-free boxes.
3. Label files with file titles and dates
 - Parish Pastoral Council Meeting Minutes 2000-2004
 - Annual Reports 2008-2009

For easy retrieval of files, a complete list detailing the contents of all boxes in the archives will be created. This list will include the following information:

- box number / file number / file title
- brief description of the items in each file (where necessary) / dates of the materials in each file.

See the *Sample Parish Archives Box and File List* at the end of this guide.

Location for parish archives is to be:

1. free from sunlight (i.e. no windows);
2. free from temperature and humidity fluctuations;
3. clean (free from mould, dust, dirt); and
4. secure (i.e. a room that locks or has limited access).

Contact the archdiocesan Archivist for advice and explanation about setting up, maintaining or caring for your parish archives.

Sample Box and File List

St. Innocent Parish Archives – Box and File List

Box Number	File Number	File Title	Description	Dates
1	1	Annual Reports		1969-2004
1	2	Bulletins		1984-1985
1	3	Bulletins		1985-1986
2	1	Parish Pastoral Council meeting Minutes	Meeting minutes (and some correspondence)	1999-2000
2	2	Parish Pastoral Council meeting Minutes	Meeting minutes (and some correspondence)	2000-2001