



# Guide for Managing Parish Records and Archives

## Introduction

The purpose of this Guide is to provide a short practical reference for managing Parish records and archives. It aims to do this by identifying the different kinds of records and recommending how long, and where, the records need to be kept. It also assists in the management of Parish archives and the importance of maintaining a Parish history.

This Guide is not intended to be a prescriptive document and the suggestions should be adapted to suit individual Parish requirements. Consideration should be taken for the most efficient use of available storage space, equipment and other resources. Parishes hold responsibility for designating storage space and storage equipment for their archives. The Catholic Diocesan Centre Archives does not have the capacity to store archives for every Parish, except for old or damaged parochial registers.

As a society we've become more accountable and many church activities are now subject to government regulations - particularly in relation to child protection and workplace safety - as well as church or Canon Law. This accountability applies equally to both traditional paper-based records or records in electronic format.

## Further Guidance

For further advice or clarification on the information contained in this guide, please contact Record Services and Archives:

- (08) 8210 8115
- [archives@adelaide.catholic.org.au](mailto:archives@adelaide.catholic.org.au)
- Level One  
Catholic Diocesan Centre  
39 Wakefield Street  
Adelaide SA 5000
- GPO Box 1364  
Adelaide SA 5001

# PARISH RECORDS

The term 'Parish record' can be broadly defined as any paper [or any other type of recorded information] that is created during the normal course of business of the Parish and used for the operations of the Parish.

Parish records include letters, diaries, financial accounts, minutes, reports, photographs, newspapers and cuttings, maps, drawings, legal documents, and so on. Records can also be on various formats such as paper, digital, cassette, video, and computer discs etc.

Regardless of the type or format, Parish records represent the administrative and pastoral memory of the Parish and are essential to its daily functions and operations.

## Deciding what to keep

Apart from the parochial registers and other records that are associated with church services, most parishes are responsible only for records of current administrative value, i.e. records that are used to conduct the daily business of the Parish. Although many of these do not have historical value and can be safely disposed, it is still important to distinguish between these temporary records and those which will eventually be of historical value and should be kept permanently in the Parish archives.

To assist in making these decisions, please see Appendix for the Records Retention Schedule guidelines. Records have been grouped into eight main categories and specific advice about the retention period/disposal action is provided for the types of records found within each category.

The categories are:

- Administrative Records
- Councils, Commissions, Committees
- Financial Records
- Personnel Records
- Property Records
- Legal Documents/Vital Records
- Memorabilia
- Sacramental Records

## Managing the records

It is important to ensure that records are well managed, particularly when the volume of records is such that important information could be misplaced, mixed up or lost entirely.

Good records management requires systematic methods for creating, receiving, using and disposing of records. In general, “disposing of records” means either transferring them to the Parish archives and keeping them permanently for administrative, legal or historical reasons, or destroying them when they are no longer required.

## Parochial Registers

When recording official information into the parochial registers it is important to be aware of the following points:

- Baptisms, marriages and burials are “public acts” and parishes are responsible for maintaining the integrity of the records and Parish registers.
- Registers should be filled in and signed by the officiating priest at the time of or as soon as possible after the ceremony. This ensures information is not lost.
- Entries should be accurate, using names registered with the State Registrar. Nicknames and initials should not be used.
- Entries should be in chronological order.
- If an error is made when completing an entry, the correction should be initialed by the officiating priest.
- No changes to dates or names can be made to an entry. If an error is discovered later, a certified amendment should be appended to the register.
- No page or entry is to be removed from a register.

## PADRE System

Application forms used for Baptisms may be destroyed after **one year**, once the information is captured in both the register and in PADRE.

All papers relating to marriages, however, must be kept **permanently**. Dispensation papers may be stored off-site through an appropriate records storage company, e.g. Iron Mountain.

# PARISH ARCHIVES

Archives are documents and records that have been selected for permanent retention. Keeping Parish archives is crucial for several reasons:

- Archives are essential for preserving the history of the development of the Parish, together with its spirit and identity.
- There are *official* church records that must be [safely] kept in accordance with Canon law.<sup>2</sup>
- In addition to the official records, each year the Parish will create important records and that should be kept, not only for financial and legal reasons but because they have important historical value and will also help tell the story of the Parish.

## Recording items

It is recommended that all items selected for retention in the Parish archive are recorded/listed into a register. This register can be in the form of a hard-copy book or kept electronically, e.g. Excel spreadsheet, whichever is most practical.

Ideally each item should be assigned a unique number and provide essential identifying information about the donor or origin of the item.

For example:

<u>File No.</u>	<u>Box No.</u>	<u>Description</u>	<u>Location</u>
0001	01	Parish Council Minutes: 1999-2002	Metal Cabinet, Shelf 1
0002	02	Book of Sunday Notices: 1905-1911 (previously belonged to Fr O'Reilly; first Parish Priest)	Metal Cabinet, Shelf 2
0003	02	Confirmation 1954 (photos donated by Mr. John Smith)	Metal Cabinet, Shelf 2

<sup>2</sup> Canon 535 #4 states: *In each Parish there is to be an archive in which parochial books are to be kept together with Episcopal letters and other documents which it may be necessary or useful to preserve. On occasional visitation or at some opportune time the diocesan bishop or his delegate is to inspect all of these matters*

# CARING FOR THE RECORDS

Parish registers and other official Parish records need to be kept safe and secure, generally in a lockable metal filing cabinet. Other items should be stored off the floor in boxes, folders and/or wrapping papers (acid free if possible). The ideal storage location would be an allocated storage room, but at the same time it is recognised that this is not a practical or feasible option for many parishes.

There are many risks that contribute to the deterioration of material. Some of these are unfavorable environmental conditions including light, high humidity and temperature as well as molds, mice and insects. Laminating documents or storing them in poor quality plastic sleeves can also contaminate and damage the items they are meant to protect while metal paper clips and staples rust and stain documents.

The following are some important 'golden rules' for care of materials:

- All items should be stored off the floor in suitable cardboard boxes, manila folders or wrapping paper (acid free wherever possible).
- Loose documents, particularly legal and other important documents, should be kept unfolded in flat envelopes or copy-safe sleeves.
- Photographs should not be kept in adhesive albums. Place in photo-safe albums or paper envelopes. All photographs should have an accompanying label or card with the date, occasion, location and names (Do not write or stick labels on photos. Where necessary, use only a soft lead pencil and write in the margin area on the back of the photo).
- Maps, plans and posters should be stored flat if possible (Do not fold). If space is limited, cardboard poster tubes may be used.
- Allow comfortable space between folders and files. Records can be lost or misplaced if filed too tightly. Too loose, however, and they may become warped.
- Use only plastic paper clips or plastic-coated paper clips for fastening. Avoid using staples, bulldog clips, nail clips, glue, tape, Blu-Tac or other adhesives. Do not use rubber bands as they eventually dry, split, and stain paper.

# THE PARISH HISTORY

The primary aim of the Parish history is to maintain an up-to-date record of significant Parish events, to provide continuity of facts and records for easy access to information by bishops, priests and secretaries newly appointed to the Parish.

The original idea was for the Parish priest to communicate the progress of the Parish to the Archbishop or Bishop, usually in a written format that was updated on a regular basis. This was normally submitted in a book called *Liber Actorum Ecclesiae*.

It is still current practice for the Parish priest to compile a Parish history, usually with the assistance of the secretary. The history may still be submitted in the *Liber Actorum Ecclesiae* or (more commonly now) in a document folder. When the history is submitted, a copy is made for the Archdiocesan archives and the original returned to the Parish (usually at the time of Visitation).

Examples of the kind of information that should be recorded in the history are:

- Names and dates of appointment of priests, assistant priests, priests on supply and other short-stay priests.
- Building of new church, school, hall or additions to same.
- Blessings of new buildings or extensions.
- Dates of administering the Sacraments, e.g. First Communion, Confirmation.
- Details of Parish retreats, Parish missions.
- Pastoral initiatives such as Rite for the Christian Initiation of Adults (RCIA), adult education, etc.
- Events connected with Parish Council, Finance Committee, Liturgy Committee, etc.
- Social functions and celebrations.

# APPENDIX: RECORDS RETENTION SCHEDULE

**Please note:** ‘Last Action’ refers to the most recent date of the document(s) in a file/folder etc.

For example: In a file, the last action was a document dated 20 December 2016.  
+ 2 years would mean that the document can be destroyed on or after 20 December 2018.

***There is no obligation that temporary value records must be destroyed once their minimum retention periods are reached. Retention periods can be extended to meet any identified risks.***

***It is important that records are disposed legally and that authorised disposal is documented for accountability purposes if ever there are questions about the whereabouts of the records.  
Standard methods for destruction of paper records are shredding or pulping.***

ADMINISTRATIVE RECORDS			
Series/ Title/ Description	Record Examples	Retention	Notes
Appointments (Canonical)	Correspondence relating to appointments of priests, deacons	Permanent	Keep permanently in Parish archives
Correspondence (routine)	Correspondence on routine Parish administration. Includes sending/receiving greetings, etc	Last action + 2 years	Review annually. Destroy 2 years after last action
Correspondence (non-routine/official/anything of a sensitive nature)	Correspondence on important Parish issues, e.g. Parish planning; records of important decisions, responding to complaints etc	Permanent	Keep permanently in Parish archives
Parish boundaries / Parish Census	Street maps, street lists, statistical reports.	Permanent	Keep permanently in Parish archives. Names and addresses of parishioners can be destroyed after census is completed.
Questionnaires, Surveys, etc	Replies to questionnaires, survey results	Permanent	Keep a copy of the final ‘outcome’ [report] in Parish archives
Church Notices and Events	Sunday Bulletins, Calendars of events; Mass Offerings; guest books	Permanent	Keep permanently in Parish archives
Parish magazines	Magazines, Newsletters, etc	Permanent	Keep permanently in Parish archives
Archbishop’s Visitation	Papers relating to Archbishop’s (or delegate) scheduled visitation to Parishes, e.g. reports	Permanent	Keep permanently in Parish archives

## COUNCILS, COMMISSIONS, COMMITTEES

Series/ Title/ Description	Record Examples	Retention	Notes
Constitution and By-laws - for all Parish organizations	Original, signed copy of constitution	Permanent	Keep permanently in Parish archives
Pastoral Council Minutes/Agendas & related papers	Agendas, Minutes, Reports	Permanent	Keep as active records during Life of the Council. Transfer to Parish archives when Council ceases to exist
Finance Council Minutes/Agendas & related papers	Agendas, Minutes, Reports	Permanent	Keep as active records during Life of the Council. Transfer to Parish archives when Council ceases to exist
Liturgy Committee Minutes/Agendas & related papers	Agendas, Minutes, Reports	Permanent	Keep as active records during Life of the Council. Transfer to Parish archives when Council ceases to exist
'Other' Councils / Committees	Agendas, Minutes, Reports	Permanent	Keep as active records during Life of the Council. Transfer to Parish archives when Council ceases to exist
Membership	Membership lists; committee contact details, etc	Life of the Council/ committee	Destroy when Council ceases to exist

## EQUIPMENT & STORES

Series/ Title/ Description	Record Examples	Retention	Notes
Acquisition & Disposal of Items	Records of the acquisition or disposal of goods; includes the disposal of items either by sale, transfer, destruction etc	Last action + 6 years.	Destroy 6 years after last action
Leasing	Documents concerning leasing arrangements, including special leases, sub-leases, licences and other registered documents	Lease expiry date + 20 years	Destroy 20 years after last action
Maintenance	Records of maintenance & use of equipment, etc (e.g. logbooks, meter readings)	Last action + 20 years	Destroy 20 years after last action



## FINANCIAL RECORDS – \*for the Financial Year\*

Series/ Title/ Description	Record Examples	Retention	Notes
Accounting	Invoices, cheque books, purchase orders, claims, cash books	Last action + 5 years	Destroy 5 years after last action
Audit	Records concerning financial audits	Permanent	Keep final signed audit report in Parish archives
Banking	Bank statements, reconciliations, credit card usage, cancelled, lost, replacement cheques, etc	Last action + 6 years	Destroy 6 years after last action
Budgeting	Annual budget papers and/or budget review documents.	Permanent	Review annually & cull unnecessary items such as draft papers. Keep copy of <b>final approved budget</b> in Parish archives
Donations	Records of significant donations given to or issued by the Parish; includes property, money, equipment, memorabilia etc	Permanent	Keep permanently in Parish archives
Insurance Policies (employers/Parish liability)	Insurance policies and levies covering Parish staff, volunteers, Parish members, etc against injury or death resulting from accidents or incidents	Keep 30 years after policy or levy expiry date	Destroy 30 years after expiry date
Insurance (other than employers/ Parish liability)	Management of insurance claims and policies concerning loss or damage to property, premises or vehicles; and to cover Parish members/staff against injury or death resulting from incidents on Parish premises	Last action + 7 years	Destroy 7 years after last action
Planned Giving programmes	Records of financial pledges, weekly offerings, Easter dues etc.	Last action + 5 years	Destroy 5 years after last action

PERSONNEL RECORDS			
Series/ Title/ Description	Record Examples	Retention	Notes
Employee files for staff and volunteers	Position description; appointment letters; contract of employment; , study leave; training courses attended, emergency contacts; police check forms, applications etc.	Keep 75 years from employee's date of birth	
Rosters; timesheets; travel claims etc.	Attendance records; logbooks	Last action + 7 years	Destroy 7 years after last action
Volunteer files	Position description; appointment letters; contract of employment; , study leave; training courses attended, emergency contacts; police check forms, applications etc.	Keep 75 years from employee's date of birth	

LEGAL DOCUMENTS / VITAL RECORDS			
Series/ Title/ Description	Record Examples	Retention	Notes
Deeds, Wills, Statutory documents	Title deeds and/or other documents concerning acquisition and disposal of property. Personal wills; Statutory documents	Permanent	Keep permanently in Parish archives
Charities, Trusts, Donations	Accounts; Agreements; Deeds; Benefactions; Distribution lists; Statutory Documents	Permanent	Keep permanently in Parish archives

MEMORABILIA			
Series/ Title/ Description	Record Examples	Retention	Notes
Memorabilia and/or any item that will help to tell the story of the Parish, particularly if it was originally produced by the Parish.  <b>Note:</b> Add details wherever possible of where they were sourced; who is in the photos etc.	Newspaper cuttings; Parish scrapbook; Personal diaries; Photographs; Postcards; Posters; Framed pictures; Plaques; Banners; Promotional materials; Keepsakes; Souvenirs, etc	Permanent	Keep permanently in Parish archives  Keep one or two copies of printed materials, no need for multiples.

PROPERTY RECORDS			
Series/ Title/ Description	Record Examples	Retention	Notes
Property Register	Register of property owned by the Parish	Permanent	Keep permanently in Parish archives
Certificates of Title, Deeds	Legal Certificates of Title, Deeds, etc	Permanent (unless property is sold or transferred)	Keep permanently whilst property is owned by the Parish
Acquisition and/or Disposal	Records concerning sale or transfer of property	Permanent	Keep permanently in Parish archives
Architectural plans, drawings	Plans, photographs, drawings, sketches	Permanent (unless property is sold or transferred)	Keep permanently whilst property is owned by the Parish
Cemetery	Register of interments / cremations. Records related to managing the cemetery	Permanent	Keep permanently in Parish archives
Maintenance, Capital Works, restoration	Records concerning conservation and/or restoration of heritage listed or significant buildings. Also records relating to upkeep, repair, preservation of premises	Permanent	Keep permanently in Parish archives
Hire/ Use of premises; Memorandum of Understanding (MOV)	Agreement for use of the hall or other church premises	Last action + 20 years	Destroy 20 years after last action / expiry of agreement
Inventories	Inventories of goods and property	Permanent	Keep permanently in Parish archives
Security	Records relating to installation & maintenance of electronic security / surveillance. Also includes security procedures, key registers etc	Last action + 6 years	Destroy 6 years after last action

SACRAMENTAL RECORDS			
Series/ Title/ Description	Record Examples	Retention	Notes
Parochial Registers	Baptism; First Communion; Confirmation; Marriage; Burial	Permanent	Keep permanently in locked secure environment, preferably a fire-proof safe or metal cabinet.