

GUIDELINES FOR MANAGING PARISH RECORDS & PARISH ARCHIVES IN THE ADELAIDE ARCHDIOCESE

INTRODUCTION

The purpose of this Guide is to provide a short practical reference for all who are involved in managing parish records. 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 briefly discusses the management of parish archives and the importance of maintaining a parish history. It is not intended to be a prescriptive document and the suggestions should be adapted to suit individual parish requirements.

FURTHER INFORMATION

For further advice, assistance or clarification on anything contained in this guide please contact the archdiocesan Archivist/Records Manager, on 8210 8115 or email: archives@adelaide.catholic.org.au.

1. PARISH RECORDS

What are parish records?

The term ‘parish record’ can be broadly defined as any paper [or any other type of recorded information] that is created/drawn up during the normal course of operations of the parish and used for the operations of the parish.¹

This can include letters, diaries, financial accounts, minutes, reports, photographs, newspapers and cuttings, maps, drawings, legal documents, and so on. The records can also be in any one of a number of formats such as paper, microfilm, cassette, video, computer discs and other machine-readable format. Irrespective of type or format however parish records represent the administrative and pastoral memory of the parish and are essential to its daily functions and operations.

It’s also important to note that all records, including email and facsimiles, generated or received and used for the business of the parish are the physical and intellectual property of the parish, not the member of staff who created or received them.

Managing the records

Good parish record-keeping involves having systematic methods for creating, receiving, using and disposing of records. In general this will usually mean either transferring them to the parish ‘archives’ and keeping them **permanently**, or destroying them when they are no longer needed for

¹ A record is information in any format created, received, and maintained as evidence and information by an organisation or person, in pursuance of legal obligations or in the transaction of business. [Source: Adapted from Standards Australia, *AS ISO 15489, Part 1, Clause 3.15*].

administrative, legal or historical reasons. The most important factor however is to ensure that the records are well managed, particularly in the present climate where the volume of records is such that important information can be easily misplaced or lost entirely.

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

Deciding which records 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 of, it's still important to distinguish between these [temporary records] and those which will eventually be of historical value and should be preserved [kept permanently] in the parish archives.

In order to assist parish officers in making these decisions a ***Records Retention Schedule*** is included with this Guide as Appendix 1. The schedule is in the form of a table; records have been grouped into seven main categories and specific advice about the retention period/disposal action is given for the different types of record found within each category. The categories are:

- Parish administration
- Parish councils
- Parish finance
- Church property
- Legal records
- Historic records
- Sacramental Registers

2. PARISH ARCHIVES

Archives are documents and records that have been selected for preservation (i.e. permanent retention). The keeping of parish archives is crucial for several reasons.

First the archives are essential for preserving the history of the development of the parish, together with its spirit and identity.

Second, there are ***official*** church records that must be [safely] kept in accordance with Canon law.²

And thirdly, in addition to the ***official*** records, each year the parish will create or create important records and that should be kept, not only for financial and legal reasons but because they have important research or historical value and will also help tell the story of the parish.

² **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.*

Examples of some of these materials are given in Appendix 2: *Official Records & Additional Materials for the Archive*.

Recording items in the archives

It's recommended that all items selected for inclusion in the *parish archive* should be recorded / listed [*accessioned*] into a register. The register can be in the form of a hard-copy book or kept electronically.

Ideally the register should give each item a unique number and provide essential identifying information about the donor or origin of the item. Some examples might include:

<u>No</u>	<u>Description</u>	<u>Location</u>
45	Parish Council Minutes: 1999	Give box no. & file/folder no
46	Book of Sunday Notices: 1905-1911 (previously belonged to Fr O'Reilly; 1 st PP)	Box no, etc
47	Confirmation 1954 (photos donated by Mr. J. Smith)	Box no, etc

3. THE PARISH HISTORY

The primary aim of the parish history is to maintain an up-to-date record of significant parish events, and in so doing, provide continuity of facts and records for easy access by bishops, secretariat and priests 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's still the current practice for the parish priest to compile the 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

4. CREATING OFFICIAL RECORDS

When creating the official records it's 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
- 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 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 at a later date a certified amendment should be appended to the register
- No page or entry should be removed from the register

5. CARING FOR THE RECORDS

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

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

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

- All items should be stored off the floor in boxes, folders and wrapping paper (acid free wherever possible)
- Loose documents, particularly legal or important documents, should be kept (unfolded) in flat envelopes or polypropylene sleeves
- Photographs should not be kept in adhesive albums but put into polypropylene envelopes
- All photographs should have a label with date, occasion, location and names (Do NOT write on photos but where absolutely 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 roll or fold)

- Allow ample space between folders and files. Records can be easily lost or misplaced if filed too tightly
- Use only plastic paper clips

APPENDIX1: RECORDS RETENTION GUIDELINES FOR PARISHES AND COMMUNITIES OF THE ADELAIDE ARCHDIOCESE

Series/ Title/ Description	Record Examples	Retention	Notes
ADMINISTRATIVE RECORDS			
Appointments (Canonical)	Correspondence relating to appointments of priests, deacons	Permanent	Keep permanently in parish archives
Correspondence (routine)	Correspondence on routine parish administration. Also includes sending/ receiving greetings, responding to complaints, etc	Last action + 2 year	Review annually. Destroy 2 years after last action
Correspondence (non-routine)	Correspondence on important parish issues; e.g. parish planning; records of important decisions etc	Permanent	Keep permanently in parish archives
Parish boundaries / Parish Census	Street maps, street lists, census cards	Permanent	Keep permanently in parish archives
Questionnaires, Surveys, etc	Replies to questionnaires, survey results,	Permanent	Keep a copy of the final 'outcome' [report] in parish archives
Church Notices	Sunday Bulletins, Calendars of events; Mass Offerings	Permanent	Keep permanently in parish archives
Parish magazines	Magazines, Newsletters, etc	Permanent	Keep permanently in parish archives
Visitation	Papers relating to Parish visitations; e.g. reports; statistics	Permanent	Keep permanently in parish archives
COUNCILS, COMMISSIONS, COMMITTEES			
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			
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 + 6 years	Destroy 6 years after last action
Maintenance	Records of maintenance & use of equipment, etc (e.g. log books, meter readings)	Last action + 6 years	Destroy 6 years after last action
FINANCIAL RECORDS			
Accounting	Invoices, cheque books, purchase orders, claims, cash books	Last action + 6 years	Destroy 6 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. Keep copy of final approved budget in parish archives

Donations	Records of significant donations given to or issued by the parish; includes property, money, equipment, 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	Records of financial pledges, weekly offerings, Easter dues etc	Last action + 7 years	Destroy 7 years after last action
PERSONNEL RECORDS			
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 100 years from employee's date of birth	
Time –sheets; travel claims etc	Attendance records; log books	Last action + 7 years	Destroy 7 years after last action
PROPERTY RECORDS			
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 while 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 while property is owned by the parish
Cemetery	Register of interments / cremations. Records related to managing the cemetery	Permanent	Keep permanently in parish archives
Conservation and/or maintenance	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	Agreement for use of the hall or other church premises	Last action + 6 years	Destroy 6 years after last action
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
LEGAL DOCUMENTS / VITAL RECORDS /			
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			
Memorabilia and/or any item that will help to tell the story of the parish	Newspaper cuttings; Parish scrapbook; Personal diaries; Photographs; Postcards; Posters; Banners; Promotional materials; Keepsakes; Souvenirs, etc	Permanent	Keep permanently in parish archives

SACRAMENTAL RECORDS			
Parochial Registers	Baptism ; First Communion; Confirmation; Marriage; Burial	Permanent	Keep permanently in locked secure environment.

APPENDIX 2: OFFICIAL RECORDS AND ADDITIONAL MATERIAL FOR THE PARISH ARCHIVES

The official and additional records that should be kept at a parish can be broadly grouped into one of three categories, each of which should include the following materials:

REGISTERS

- Baptism
- Confirmation
- Marriage
- Acolytes
- Special Ministers
- Adult Catechumenate

DOCUMENTS

- Financial Records
- Parish Census, boundaries
- Parish Council and/or Other Parish Organisations' Minutes
- Parish visitation
- Marriage Declarations
- Parish Inventory

ADDITIONAL

- Any or all of the above
- Documented parish history, including records of priests' appointments, etc
- Parish newsletters and/or magazines, parish publications of any kind
- Memorabilia, including posters, banners, keepsakes
- Photographs
- Souvenirs