

Directive 6.1 Maintaining a Parish Archive

All parishes, quasi-parishes and missions must safeguard certain documents, records and artifacts in the parish archive. The archive is to consist of a safe storage area of sufficient size and ease of access to hold all the necessary historic records and artifacts of the parish. The parish priest is responsible for ensuring that there is an archive in his parish of residence and that the archive of each of his quasi-parishes or missions is also safeguarded in his parish of residence or in the Chancery.

This directive outlines the documents that must be stored, in perpetuity, in a parish archive. It also provides a table, Table 6.1.A, at the end, listing records that are only kept for a certain period before being destroyed. The parish priest is responsible for ensuring the documents are destroyed as required.

1. Legal Documents

These include legal, civil and ecclesial documents relating to the establishing of a parish, quasi-parish or mission.

Some examples:

- The decree by the ordinary of the creation of the parish, quasi-parish or mission. This decree should include the official date and name of the parish, quasi-parish or mission, its juridical boundaries, and its governing structure.
- Land titles, act of incorporation, contracts and other signed agreements.
- Any map of the properties with marked identification of all overhead or in-ground lines, services, and other features.
- Any plans and/or blueprint of buildings on the property.

2. Ceremonial & Liturgical Documents

These documents include liturgical booklets, speeches by priests and other parish officials, presentations, and photographs or videos.

Some examples:

- Official sod turning.
- Blessing of corner stone.
- Dedication or blessing.
- Episcopal appointments, ordination and installation; visitations.
- Minor orders: Rite of acceptance, lector, acolyte.
- Ordination to the diaconate.
- Vows of a religious.
- Written documents, copy of certificates, speeches, presentations and photographs.

3. Sacramental Records

• Parochial Registers

Parochial Registers are the principal and mandatory method for recording parish sacraments.

In January of 2014, a new series of sacramental registers were printed and issued to all parishes, quasi-parishes and missions of the Archdiocese. These and all previous registers are to be kept together in a safe and secure location in the parish office.

Registers from quasi-parishes and missions should always be kept in the office where the priest has his residence.

- **Secondary records**

For parishes using Parish Friendly to record sacraments: At the end of each year, a hard copy of all register entries for that year must be sent to the Chancery as well as an electronic (Parish Friendly) file.

Records of children and adults who received the sacraments of First Reconciliation and First Eucharist should also be kept in the parish archives.

- Apostasy (cf. Policy 2.2.3 Registering Apostasy and 2.2.3.1 Act of Re-Admission)

Every once in a while, a request to have one's baptism record removed from the church register is received. We know that we cannot 'erase' the sacrament from having been celebrated and received, but the request is to be noted on the baptism record. Therefore, the request must be in writing, in the form of a signed letter by the requester. The letter must be kept with the entry in the baptism register. A copy of the letter is to be sent to the Chancery archives for notation.

When a request for 'readmission' into the church is received at a parish, the Ordinary or Chancellor should be contacted and proper steps taken. Notation of the decision must be entered in the parish baptism register and at the diocesan archives.

4. Records of Parish Ministries and Ministers

Policy 5.1.2 explains the process for preparing an annual list of all parish ministries and their ministers. A copy of each list is to be kept in the parish archive, while the original is submitted to the Chancery.

5. Administration Documents

The following are to be treated as archival and historical documents:

- a. The Parish Pastoral Council constitution.
- b. All Parish Pastoral Council meeting minutes.
- c. All Parish Finance Council meeting minutes.
- d. The Parish Finance Council constitution, bylaw or terms of reference, if applicable.
- e. All minutes for special and extraordinary meetings in the parish.

Copies of all meeting minutes listed above are to be printed, dated and signed or initialed by the parish priest and committee chairperson before filing. Electronic copies may also be retained and are to be treated as electronic parish records.

6. Electronic records

Parishes may choose to create electronic records of parish sacrament, financial, administrative and other records and documents. In most cases, these will be secondary records (e.g. sacramental records, some financial documents), and in others they may be the principal record (e.g. photographs, speeches and homilies). The parish priest must ensure that paper records are made if so required and the initial document is created electronically.

When creating electronic records, please keep in mind the following best practices:

- USB records deteriorate over time and should be renewed or refreshed at least every five years.
- Electronic storage modes become obsolete. Be sure to make allowance for the cost of replacing the mode of storage in the next five to ten years.
- Electronic storage modes should be reviewed annually to ensure they remain a supported or available technology.

7. Financial and Employment Records and Documents

The following financial documents are to be kept in perpetuity in the parish archive:

- a. Annual parish budgets.
- b. Annual financial reports.
- c. T4 summaries.
- d. Employee records (time sheets, attendance, sick leave, vacation leave, discipline, performance reviews, employment applications).
- e. Expenses claim forms.

All records and documents related to archdiocesan Policy 5.1.1, 5.1.2, 5.2.1 and 5.2.2 are not kept in the parish archive, except as described in those policies.

All other financial documents are to be retained for the period specified in Table 6.1.A at the end of this directive.

8. Other Parish Documents and Records

- a. A copy of each Sunday bulletin or special event bulletin.
- b. A copy of each Extraordinary Expenditure request and notification of receipt.
- c. A copy of Marriage interview forms and request for dispensation or permission.
- d. A copy of Tribunal correspondence and inquiries.
- e. A copy of a map of a cemetery that is or was a property of the parish with graves identifications.
- f. Burial permits.
- g. Church inventory.
- h. Rectory inventory.

9. General Interest Documents and Records

The parish archive should also hold documents and records of general interest, including correspondence, photographs, and publications.

Some examples:

- Any note, letter, news article or story written on the life of the parish, quasi-parish or mission.
- All letters from the bishop or other diocesan authority written directly to the parish, quasi-parish or mission.
- All letters from the parish priest to his parish, quasi-parish or mission.
- All letters received that accentuate the life of the parish.

- A copy of all correspondence sent from the parish (letters, notifications, informational, etc.,) to the chancery, to parishioners, or to other persons, churches, or organizations.
- A copy of all standing committee and ad hoc committee reports.
- All photographs that tell the story of the parish, quasi-parish or mission. (As best as possible, all persons, places and events in the photograph should be identified.)
- All negatives to photographs should be filed and have a corresponding identification number to a photograph when possible.
- All photographic slides (for projectors) relating to the life of the parish, quasi-parish or mission.
- All forms of video or film relating to the life of the parish, quasi-parish or mission (As best as possible, they should be dated and identified.)
- All newspaper articles should be identified with the date of publication, the name of the newspaper and of the author for authenticity.
- Photo pictorials, such as parish directories and year books.
- Historical books of the parish.
- All events reports: parish anniversary, bazaars, fundraisers, etc.
- Records related to parish group events: Youth Group, etc.

10. Artifacts

A parish may possess objects of historical or cultural interest, or that have some monetary value, but no contemporary use. These objects should also be preserved in the parish archive, or, if more appropriate, another safe storage area in the parish with an identifying document (or log book) in the archive. Please consult the Archbishop, Chancellor or Archivist if you have questions or are uncertain about keeping an object.

Some examples:

- sacred vessels no longer in service (chalice, paten, ciborium, monstrance, etc.);
- old style embroidered vestments;
- altar stones.

- Annals

An annal or codex (an official list of events, activities each year) should be kept by the parish priest or other member of the parish community. Completed annals are to be kept in the parish archive.

Table 6.1.A**Retention Periods of Specific Types of Documents**

Type of Record	Required Retention Period	Type of Storage
Official receipts for income tax purposes	3 years	Locked
Payroll records, individual T4's	7 years	Locked
Record of Employment (ROEs)	7 years	Locked
Monthly financial statements (Trial Balance, Bank Reconciliation, Financial Statement working papers, etc.)	7 years	
Bank statements, cancelled cheques	7 years	
Invoices, receipts	7 years	
Donation records	7 years	Locked
Church envelope records	3 years	

Table 6.1.B**Documents to be Retained in Perpetuity**

Type of Record	Required Retention Period	Type of Storage
Sunday bulletins	Forever	
Sacramental records		
Sacramental registers	Forever	Locked
Canonical marriage files	Forever	Locked
Tribunal correspondence	Forever	Locked
Employment records		
Other employee records	Forever	Locked
T4 summaries	Forever	
Parish financial records		
Annual budgets	Forever	
Expenses claim forms	Forever	
Extraordinary Expenditure petitions	Forever	
Annual Registered Charity Information Returns (T3010)	Forever	
Parish meeting records		
Minutes of meetings (dated and signed)	Forever	
Constitutions for PPC and PFC	Forever	