

Parish Records Disposal Schedule



September 2018

PARISH RECORDS DISPOSAL SCHEDULE

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Approved for use in parishes of the Catholic Diocese of Christchurch : *+ P. G. MarLison*

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Canon Law Requirements

Parish records are key to a fuller understanding of Diocesan history. The Bishop's responsibilities in respect of Parish Archives are laid out in Canon Law section 491:

Can. 491 §1. A diocesan bishop is to take care that the acts and documents of the archives of cathedral, collegiate, parochial, and other churches in his territory are also diligently preserved and that inventories or catalogs are made in duplicate, one of which is to be preserved in the archive of the church and the other in the diocesan archive.

While the Parish responsibilities are set out in Canon Law section 535:

Can. 535 - §1. Each parish is to have parochial registers, that is, those of baptisms, marriages, deaths, and others as prescribed by the conference of bishops or the diocesan bishop. The pastor is to see to it that these registers are accurately inscribed and carefully preserved.

§4. In each parish there is to be a storage area, or archive, in which the parochial registers are protected along with letters of bishops and other documents which are to be preserved for reason of necessity or advantage. The pastor is to take care that all of these things, which are to be inspected by the diocesan bishop or his delegate at the time of visitation or at some other opportune time, do not come into the hands of outsiders.

General

Parishes have responsibilities to ensure that records of archival value are ordered, preserved and accessible over time, while other records need only be kept for a set period of time and then disposed of securely.

This disposal schedule applies to all Parish staff, volunteers and staff contracted to perform activities for the Parish and to all records owned by the Parish (whether created or received) regardless of format, storage medium, or location.

Records and Litigation

When records become involved in an enquiry or legal issue, a litigation hold will be placed upon the records. A litigation hold is a suspension of records' retention/destruction actions for those documents that may be relevant to a legal issue and/or lawsuit that has actually be filed or one that is reasonably anticipated. It ensures that relevant information is not destroyed.

Key personnel should be notified that no records should be destroyed or deleted until the scope of the litigation or enquiry is known.

Archive Storage

The Diocesan Archives can provide advice and guidance on the appropriate care and storage of archival records, and advice on records retention and records destruction.

Ideally, parishes should allocate a centralized area for the storage of parish archives, to ensure archives can be easily located. Consideration need to be given to the conditions for storing a range of archives including:

- Security – archives are accessible by authorised persons only
- Climate controlled – while there are certain ideal conditions in terms of temperature and humidity, the over-riding concern is that conditions remain constant/stable, with little fluctuation (no more than $\pm 5^{\circ}\text{C}$ temperature and $\pm 10\%$ relative humidity over a year).
- Pest free – the storage area needs to be regularly fumigated and potential pest threats managed. A bug bomb used every 4-6 months will lessen many pest risks.
- Disaster planning – fire protection measures need to be in place, and storage conditions should mitigate the impact of a natural disaster or hazard as much as is practicable (eg flood, earthquake).
- Shelving – appropriate shelving for size and format of media should be used and items should be packed in containers where practicable.

Material identified as archival should be listed and a location noted. For example:

Box number	Description	Date range	Location
Box 2	Parish Council Meetings (agendas, reports, minutes)	2001-2005	Parish Office - red shelves

This list should be retained as part of the current recordkeeping system. An additional copy should be stored off-site for use in the event of a disaster, to assist with identifying damaged or lost records.

RECORDS DISPOSAL SCHEDULE

Sacramental Registers

Registers of Baptism, First Communion, Confirmation, Marriage and Death	Archive [Registers 60 years or older should be transferred to the Diocesan Archives]
Notifications of confirmations or marriage from other parishes, or notices of annulments	Enter details in register, retain for 1 year, then securely destroy

Newsletters and Publications

Parish Newsletter/Bulletin	Archive
Jubilee or anniversary publications	Archive 2 copies. One can be accessed for reference and one retained for preservation.
Written Parish histories	Archive 2 copies. One can be accessed for reference and one retained for preservation. One copy should be archived with the Diocesan Archives.

Property Records

Building Warrant of Fitness	Retain current
Plans (as built)	Archive
Reports relating to parish property	Archive
Asset Register	Archive (pdf or printed report)
Maintenance and repair records	Destroy 7 years from date of closure

Governance

Parish Council

Parish Council agendas, minutes and reports	Archive
Annual reports	Archive

Parish Committees

Parish Committee (for example Building, Finance, Pastoral) agendas, minutes and reports	Archive
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Correspondence

Inwards and Outwards correspondence	Archive
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Photographs

Photographs (digital and prints and negatives) of clergy, parish buildings, and parish events	Archive
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Employment

<p>Employment records*</p> <p>*Employment records relate to paid employees and unpaid employees (volunteers)</p>	<p>Destroy - Employment records of paid and unpaid parish employees may be destroyed 7 years after close of file as long as a Summary of each employee is retained (see below).</p> <p>In some circumstances the employment records may be retained as archives, in cases where the employee received national awards or honours, or academic awards.</p>
<p>Summary of employment history - Summaries of personnel history from information systems documenting employee details such as:</p> <ul style="list-style-type: none"> - name - employment location - date of birth - duties - dates of employment/volunteering 	<p>Archive</p> <p>(Please Note: This should be retrospectively compiled when such summary information can easily be identified and retrieved, and must be collected for all future paid and unpaid employees)</p>

Finance

Annual financial accounts	Archive
Parish asset register	Archive
Transactional records	Destroy 7 years from date of action
Policy and Procedures	Archive

General

Historical information	Archive/Destroy – Research compiled for parish histories can often contain interesting information useful for future research. Collections of research material should be weeded for items of interest or value eg scrapbooks
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Insurance	Destroy 7 years from the settlement of the claim/ close of the file. Some Earthquake related insurance records have information value and may be retained as part of the Parish Archive
Contracts and agreements	Archive
Leases	Destroy 7 years from date of expiration
Complaints - facilities	Archive substantial complaints. Destroy 7 years from date of complaint or closure of file – complaints relating to facilities
Complaints - personnel	Archive –complaints (of any nature) against clergy and parish personnel and ensure the parish responses are also archived

Administration

Parishioner lists	Retain until superseded
Mass Record (<i>record of daily mass requests and intentions, offerings, etc.</i>)	Retain until superseded
Census records	Destroy 7 years from date of expiration
Rosters (<i>ushers, altar servers, lectors, Eucharistic ministers, musicians</i>)	Retain until superseded

Notes