Parish Records Guidelines

Why keep Parish records

Records show the activities and decisions made in a Parish. These are useful for a variety of purposes.

- All of the records created by a church or parish are valuable and unique documentary evidence of the activities of the parish. Records selected as permanent records, or archives, are those records which have value as authentic evidence of administrative, corporate, cultural and intellectual activity within the Parish.
- Almost all of these records can be viewed as records created to document the history of a church or parish in its day-to-day activities. The culture (social and intellectual life) of the church and parish, and the role it has played in the history of its village, town, region and the Diocese, is also revealed via the church and parish records.
- The work of every church and parish in this Diocese will be of interest to researchers and historians in the future. The diligence of parish staff and the Diocesan Archives Committee in caring for these records will ensure that church and parish collections will be available to provide a unique and irreplaceable record of the work of the past and present.

What records must be kept

The Diocese has a Retention and Disposal Authority which outlines all records which need to be created and how long they need to be kept. This is available from the Diocesan Office if required. A summary of what parish records need to be kept is listed below.

For records with a **Permanent/Temporary** retention, consultation with Diocesan Registry is required before disposal.

Record Types	Titles	Retention period
Registers	Baptismal, confirmation, burial, marriage, service and Banns	Permanent
Official Records	Parish Council, Building Committee, Churchwardens, Trustees, Sub-committees, Wardens - minute books, contracts, plans, lists of office bearers etc	Permanent
Accounting records	All financial transactional records. Excludes: Annual Financial Statements, Bank journals, final audited accounts. These are to be kept permanently.	Must be kept 7 years after Audit, then securely destroyed
General correspondence	Inward and outward including backed up emails.	Permanent/Temporary
Official Correspondence	Episcopal and from the Registrar: inward and outward including backed up emails.	Permanent

Record Types	Titles	Retention period
Annual Reports	at least one hard copy	Permanent
Parish organisations	Sunday school/club, Youth, Men's, Women's - minute books, correspondence, lists of office bearers, attendees especially camps etc NOTE: Must keep the attendance registers and staff rosters for all parish activities for minors (under 18-year-olds)	Permanent/Temporary
Inventory Buildings and contents	Inventory of all furniture, service books, muniments, records and vessels belonging to the church, including photographs of items, and update/correct the inventory from time to time.	Permanent
Orders of Services, pew sheets, Newsletters, etc	printed and bound, if possible, but electronic copies saved	Permanent/Temporary
Personal	clergy records, memorabilia, reminisces, etc	Permanent/Temporary
Photographs	clergy, office bearers, buildings, functions etc - named and dated preferably	Permanent/Temporary
Artifacts and donations	record their provenance – where and from whom. Deed of gift documentation if possible.	Permanent

How should the records be kept

All records, like those listed above, provide an historical and legal account of the parish and its activities need to be stored correctly. They need to be organised, boxed and labelled to make for easy retrieval. They are not to be destroyed without proper authority (See Disposal Guidelines) permanently in an orderly way. This includes both physical and digital records. Where material is stored in a combination of places, a clear summary should exist noting locations. Most records should be held in the Parish/Rector's office or the church vestry.

Some records relating to the history of the parish at each location such as news sheets, orders of service and annual events can be kept as determined by the Parish members but should also be kept in an organised and secure way for easy access.

Records of volume, such Minutes and AGM reports, should be kept as organised as possible in date and year order, bound and in boxes also clearly labelled. This will facilitate easy retrieval in the event they are required for purposes relating to Child Safety or Professional Standards. If in doubt, keep material that indicates people were present or participating at any given time.

Who can access parish records

Many parish records are public and open to anyone. These include old parish newsletters, pew sheets, orders of services etc. But information held in the Registers and minutes of meetings etc have limited access. If in doubt check with the Diocesan Registry.

When providing information to enquires from the public, confidentiality must be observed. Only provide current details to the person requesting the information, not to other family members or friends etc. When coping registers, take care to only provide the 1 line or 2 lines of information and hide any other lines. For family historians, the persons being inquired about must be deceased for 25 years, as there is currently great concern over stolen identities.

Any inquiries about Sunday School, parish camp lists, etc or any suggestions to do with child abuse should be referred to the Diocesan Registry or Director of Professional Standards.

Methods of disposal

Once Authorisation has been obtained for destroying parish records, the records must be either **shredded or placed in secure destruction bins**. Records cannot be just placed in rubbish or recycling bins as they may include personal or confidential material.

Further information:

Archives and Records Policy and Principles
Destruction Authorisation Form

Appendix 1: Record sets and definitions for Parishes

Parish Governance		Parish Operations		Parish Administration	
Activities to ensure good governance of a Parish to meet both Diocesan and civil regulatory and statutory compliance requirements. Activities include maintaining correct records for management of Parish Council, Wardens' meetings, Parish groups and events; operational and strategic plans; undertaking all Safe Ministry compliance requirements. Liaison with Diocese and the wider community and agencies. Also includes the election of members to nomination and presentation Boards, Synod etc.		The activities of the Church to organise, arrange and conduct Services of Worship, Pastoral Care, Mission and outreach and teaching. Includes encouraging clergy, staff and congregations to develop their knowledge, skills and abilities (through activities, programs and events) to maximise their potential and knowledge of the Bible, and their Christian faith. Includes identifying and implementing all aspects of training needs and programs (internal and external) to meet regulatory and statutory compliance requirements.		The activities associated with the administration of a Parish to comply with mandatory or optional accountability, legal, regulatory or quality standards or requirements to which the Parish is subject. Includes management of staff and volunteers, the property of the Parish, finances and risk mitigation activities include safety of children and adults, health and safety of employees, hazards in and around church property etc. Also includes communications and liaison activities between the Clergy and Parishioners, wider community etc in all formats including newsletters, website, emails etc.	
Category	**Record types**	**Category**	**Record types**	**Category**	**Record types**
Diocese and Wider Church	○ Ministers Fraternal etc ○ Returns to Registry ○ Parish returns ○ Synod and Committees ○ Strategic Plans ○ Safety in Ministry	**Worship**	○ Parish Registers ○ Services – Sundays ○ Services - Special & Civic ○ Music ○ Weddings, baptisms and Funerals	**Staff**	○ Staff ○ Volunteers ○ Professional Standards ○ Professional development
Parish Council and official groups	○ Parish Council meeting records ○ Clubs and groups ○ Wardens	**Pastoral Care**	○ Visiting ○ Hospital visitors	**Finance**	○ Accounting ○ Budgets ○ Insurance ○ Financial statements / Reporting and returns
Safe Ministry	○ Licenced Lay Ministers ○ Volunteers	**Mission and Outreach**	○ Mission Groups ○ Mothers Union ○ Op shops, soup kitchens etc	**Property and Facilities**	○ Rectory Maintenance ○ Church Maintenance ○ Other facilities Maintenance ○ Contracts/leases ○ Rents, building bookings etc ○ Parish car or payments
Planning	○ Operational Plans ○ Policy ○ Procedures	**Education**	○ Safe ministry training (Online & face to face) ○ Under 18's groups including, Sunday School, Kids clubs etc ○ Adult groups including bible studies, Lenton studies, seminars etc ○ Bible study groups ○ SS Rosters ○ Youth group rosters ○ SRE Rosters	**Communications**	○ Pew sheets ○ Newsletter / magazine etc ○ Website / Facebook ○ Computers ○ Phones mobiles etc ○ Conferences, courses and seminars