

## A SUGGESTED ARRANGEMENT OF PARISH RECORDS

The documents highlighted in red must be retained.

Series I. Sacramental records – recommended these be stored in a safe or fireproof cabinet

- A. Parish Registers
- B. Service record books
- C. List of Communicants
- D. Transfers (both in and out)

Series II. Parish administrative records, such as:

- A. Articles of Incorporation & By-Laws
- B. A list of the founding members of the parish
- C. Mission statements and Constitution
- D. Annual meetings (both the minutes and the annual reports)
- E. Vestry minutes and related records (supporting documents for decisions)
- F. Parochial reports to the diocese
- G. Other official diocesan communications, surveys, letters etc.
- H. Legal papers: deeds, titles, litigation \* (May wish to keep with financial records or Buildings & grounds)
- I. General parish correspondence
- J. Cemetery records
- K. Personnel records (not including priests and deacons.) These records are highly confidential and should be protected (locked until 7 years beyond a staff member's retirement date.) May include W-2 forms and job descriptions. Priests' and deacons Letters of Agreement should be retained for 33 years.
- L. Lists of staff, by position, and years of tenure.
- M. Organist or music director \*\*
- N. Director of Religious Education \*\*
- O. Parish administrator \*\*
- P. Sexton's notes \*\*

Series III. Clergy - Arrange by priest or deacon with categories such as

- A. Chronology of priests and deacons, vicars, rectors
- B. Priests
  - i. name
  - ii. biography & resume
  - iii. letter of agreement & hiring information (confidential)

- iv. correspondence, journals & diaries (optional)
  - v. sermons & pastoral letters, photos and news clippings
- C. Deacons same as for priests

#### Series IV. Financial Records

Depending on your parish, your financial records may be divided among the treasurer, the Clerk, and the parish administrator

- A. Here in Connecticut, we follow a specific set of rules, published by TEC "Records Management for Congregations: A Manual for Episcopal Parishes and Missions" which we will address separately. (There is a link to this document on our website)
- B. Other historical financial records to keep would be Audits, year-end reports of the Treasurer;
- C. Annual Budgets
- D. Trusts & Bequests
- E. Accounting records
- F. Pertinent correspondence
- G. Investment Committee
- H. Stewardship Committee

#### Series V. Committees, guilds, groups, clubs, etc. Include standing committees, ad hoc, and defunct.

Easiest to arrange alphabetically by name.

- A. Record books
- B. Financial records
- C. Correspondence, publicity notes photos, minutes

#### Series VI. Events and special events, celebrations, liturgies – by event, in chronological order

#### Series VII. Publications

- A. Parish histories
- B. Newsletters – 2 of each if possible
- C. Service leaflets – 2
- D. Brochures and forms (3-4 of each)
- E. Parish directories in chronological order
- F. Other: cookbooks and special publications

#### Series VIII. Other

- A. *Scrapbooks*
- B. *Photographs; tapes & visual media of events (Try to identify the people in the pictures and the event when photographed) always label on the back with a number 2 pencil or archival pen (These may need to be housed separately, in a cooler environment.)*
- C. News clippings about the parish and special events

- D. Lay biographies, oral histories; transcripts
- E. Artifacts (IDENTIFY these: how they came to the parish, when and how they were used.) Stained glass, altar vessels, etc. Include memorial gift books in this category. If your memorial book is actively in use, you may wish to keep it in your safe.
- F. Guest books, newcomers, etc.

Series IX. Buildings and Grounds – arrange by property including the following of each: this is an option you might consider. Other arrangements for this file might be within Administration such as a subcommittee of the vestry minutes or under parish administrator or under Finance)

- A. Insurance policies – because of the longevity of liability, it is probably best NOT to discard these policies (plan to keep “forever”)
- B. Deeds: Purchase information, correspondence, reports
- C. Plans & site plans (It is best to deposit any blue-prints at the diocesan archives in case of a disaster.)
- D. Renovations (all contracts for construction, payments)
- E. Annual repairs/upkeep and maintenance manuals for appliances
- F. Committee minutes and supporting documents.