

GUIDELINES FOR MAINTAINING AND ARCHIVING PARISH/CONGREGATION RECORDS

Maintaining Parish/Congregation Records

For reasons of accountability, continuity, audit/legal requirements and the preservation of the historical record, it is vitally important for a parish or congregation to maintain complete and accurate records. In both instances, the clergy and churchwardens are responsible for ensuring that such records are properly maintained. Records should be kept in a dry and secure location at the church, not in the home of a member of the parish or congregation.

Under Regulations to Canon 20.A.3, each parish and congregation must create and maintain the following records:

- Minute book(s) for meetings of the Congregation, Vestry and Parish Council;
- Such books of accounts as are necessary for the proper recording of all receipts and expenditures in the parish or congregation;
- A service or vestry book in which shall be entered a record of all services;
- A book or books for the registration of Baptisms, Confirmations, Marriages and Burials commonly known as parish registers.

Property records

Canon 22 on Church Property states that titles, deeds, mortgages, agreements or other documents relating to all parish properties should be sent to St. Cuthbert's House (Synod Office) for safekeeping. Building inspection records and equipment service contracts are to be retained by the parish or congregation as long as the building or equipment is owned or in use.

Financial records

The retention and disposal of financial records is largely dependent on Federal government legislation. Copies of the auditor's report, balance sheet, and general ledger, which form part of the annual parish submission to St. Cuthbert's House, are to be kept permanently.

The following financial records are to be retained by the parish for a minimum period of seven (7) years:

- Bank deposit slips
- Bank statements

- Cancelled cheques
- Cheque book slips
- Monthly financial statements
- Offertory envelopes
- Cash books
- Receipts
- Tax returns and other tax documents
- Payroll records (T4's, CPP and EI deductions, etc.).

Once the records above have served their full retention period, they may be destroyed with the approval of Vestry or Parish Council.

Any record relating to an ongoing investigation, court case or audit must not be destroyed, regardless of previously agreed records retention guidelines.

Archiving Parish/Congregation Records

Under Canon 17, the Diocese of Qu'Appelle Archives is mandated to acquire, preserve and make available for research purposes records of parishes and congregations. Under a written agreement with the Provincial Archives of Saskatchewan, holdings of the Diocese of Qu'Appelle Archives are housed at the Provincial Archives where they are preserved in a secure and environmentally-controlled storage area. Ownership of the records is retained by the Synod of the Diocese of Qu'Appelle. The Archivist grants access or conducts searches of the records.

What to Do with Completed Parish Registers?

Baptisms, Confirmations, Marriage and Burials are public acts. Parishes and dioceses maintain the records of such acts in trust for the participants and the whole Church and are therefore responsible for ensuring the accuracy and integrity of the records. Besides providing statistical information to the Diocese and the National Church, parish registers contain information which might be required in the future to prove the birth, Baptism, Confirmation, Marriage or Burial of an individual, or to trace family and, more recently, genetic history.

Under Regulations to Canon 20.A.3, completed parish registers should be forwarded to the Diocese of Qu'Appelle Archives. Under the terms of the agreement with the Provincial Archives, all parish registers, which contain personal information, are restricted for reasons of privacy. For access to information in these records, please contact the Archivist.

What Other Inactive Records should go to the Archives?

Under authority of Canon 17 and accompanying Regulations, the Archivist appraises and acquires non-current records created by the officers, staff, committees, and other bodies of the Synod of the Diocese of Qu'Appelle for purposes of preservation and research.

In addition to parish registers, the following records are acquired and preserved by the Diocese of Qu'Appelle Archives:

- Agendas, minutes and supporting documentation of regular, annual or special meetings of the parish or congregation, Vestry and Parish Council;
- Records of parish committees and organizations, including minutes, reports, programs, newsletters, etc.;
- Service registers (also called vestry books);
- Service leaflets and bulletins (select samples and/or special events if space is limited);
- Key financial records (auditor's reports, general ledgers);
- Correspondence, parish mailings and other documentation relating to major activities and initiatives in the life of the parish or congregation including consecration/de-consecration of church, ministry and outreach, liturgy and worship, stewardship, construction projects, dedication of major gifts and memorials, etc.;
- Parish profiles (This record, compiled when seeking a new incumbent, provides an excellent "snapshot" of the parish at the time);
- Architectural drawings or plans of church or church complex;
- Historical information and related documentation including parish or church histories, scrapbooks, newspaper clippings, etc.;
- Parish newsletters or magazines;
- Photographs: identified as completely as possible by event, persons, place and dates depicted as well as photographer (if possible);
- Audio-visual materials: identified as completely as possible by event, person(s), place and date as well as
- Parish membership rolls or lists;
- Cemetery records and plans.

Parishes and congregations wishing to turn over such records to the Diocese of Qu'Appelle Archives should submit a list of the records to Vestry or Parish Council for approval. Upon approval, please forward the records to **St. Cuthbert's House, 1501 College Avenue, Regina S4P 1B8**. The records should be marked or labeled as **Archives**. A letter should accompany the records indicating the name of the parish, contact person and telephone number as well as the list of records approved for transfer by Vestry or Parish Council.

Contact: Canon Trevor Powell
Archivist & Registrar
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