



ARCHDIOCESE OF CINCINNATI

Organizing Parish Records

Archdiocese of Cincinnati Archives

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Inventory

Before records can be arranged, you will need to know basic information about the records in your possession. To create an inventory of the records of your parish, make note of the following points:

- Where do you have records stored? Include room numbers, cabinets, etc. Look in every possible closet, attic, basement, and pastor's house.
- What office created them and is responsible for them? If they were used by a former employee, who has taken the responsibilities of the office? Categorize the records by the office that created/managed the records, not the employee.
- What are these records? Do they have a logical sequence (filed alphabetically/chronologically)? What is their approximate year span?

For example, you may find general files belonging to a former DRE. If these records are in two file cabinets, inventory them as "DRE General Files, 1987-1995, alphabetical, two file cabinets, Room 118" or however makes sense to the arrangement of your office.

While writing this inventory, clearly label boxes and file cabinets if they are not labeled already. This will help keep your notes clear for you and other employees.

Record Retention

A large amount records we create do not need to be kept permanently. The Archdiocese has a Records Retention Schedule you can consult when determining if you still need to hold on to records or if they can be destroyed. Now, this schedule is not comprehensive to parish records, but it does include many records created at parishes. Contact the Archdiocese of Cincinnati Archives for questions of record series that are not listed. (*Note: a record series is a group of records created for the same purpose and managed together. Examples of record series include "Pastoral Council Meeting Minutes," "General Ledger," "Mass Intentions Books," "Weekly Collection Envelopes," etc.*)

The Records Retention Schedule is arranged by office/activity and lists different record series and the length of time they are to be retained. Once the records have passed their

length of retention, it is permissible to destroy the records. If a record is designated "Permanent," it is to not be destroyed. These records should be set aside for keeping in the parish archives.

When destroying records identified as obsolete on the retention schedule, a log should be kept to demonstrate due diligence and a normal destruction practice rather than an arbitrary house cleaning. Never destroy records that are the subject of any pending or existing litigation. When in doubt, ask for advice before destroying records that are not clearly identified on the retention schedule.

Parish Archives

With a parish archives, you want to save those records which tell the story of your parish. When establishing a parish archives, several points need to be considered

- A designated space for the archives (in a secure, temperature controlled room)
- What budget will be given to supplies? (boxes, new folders)
- A person in charge of the management of the archives

As the permanent records are being gathered for your parish archives, keep an inventory of the records for ease of access. These are some examples of permanent records for your parish archives are (this list is not exhaustive):

- Sacramental registers
- Bulletins, newsletters, other official publications
- General financial ledgers
- Clergy records
- Records relating to lay societies
- Parish histories, directories
- Correspondence with the Archdiocese
- Blueprints
- Photographs, audio visual records
- Legal papers (deeds, property assessments, etc.)

Please note, under no conditions is a parish permitted to give away its records to an outside agency or external, unrelated secular body.

Basic archives rules.

- Keep food and drink away from the records
- Do not store records on the floor, especially if there is the risk of water damage (broken pipe)
- Store in place with minimal temperature fluctuations throughout the year (for example, basements and attics are not ideal environments for record storage)
- Do not use tape to repair ripped pages
- Do not use rubber bands

- It is preferable to store blueprints flat, but if not possible, keep them rolled in an acid-free tube or box.

Electronic Records

Organizing a parish's records includes managing the electronic records. In most cases, electronic records should be maintained in their electronic form, because preserving the context and structure of records and facilitating access to them are best accomplished in the electronic environment.

All records, regardless of format, need to be organized in order to be useful. File cabinets, file folders, and folder labels are all tools to organize paper documents. Like the file cabinet, an organized directory structure can present a hierarchy of folders and sub-folders that logically organize files by content, relationships, purpose, and originator. The benefits of good organization include better file retrieval, greater efficiency, and the need for less storage space through the identification and routine purging of non-essential records.

To ensure that active digital records are readable for future use it is recommended that a proactive maintenance plan be implemented. The maintenance plan would involve migrating records when operating systems and/or software applications are changed or upgraded. Knowing which software applications and versions were used to create the digital records is a key element in ensuring the readability and usability of the records over time. In addition, digital records stored on physical media such as CDs, DVDs, and external hard drives are subject to degradation and should be periodically recopied to new media. It is recommended that such digital media be recopied every 3-5 years.