

Parish Records Retention Guidelines



In order to help with organization, it may be useful to categorize the records in a parish as:

- Parish registers (baptism, confirmation, marriage and burial registers)
- Financial and business
- Parochial operations

Where the parish has a cemetery, a similar way of organizing documents may be helpful.

The retention of these records depends on government legislation, parish needs and archival and historical needs. Records that need to be kept permanently are 'archival' records and should be transferred to the diocesan archives at a convenient time.

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

The following pages are a general guideline for retention of records created by the parish. Individual parishes may wish to extend retention periods, or add certain types of record to the list, as is appropriate to the parish.

Record Type	Retention Period	Comments
Parish Registers	Permanent	All completed registers should be sent to the archives where they will be permanently retained
Vestry (Service) registers	Permanent	These are records of services held at the church, attendance and offerings and must be permanently retained
Financial Records		
Auditor's report	Permanent	This should be part of the annual financial statement included in the vestry report
Balance Sheet	Permanent	This should be part of the annual financial statement included in the vestry report
Bank Deposit Slip	7 Years	To be retained at the parish

Record Type	Retention Period	Comments
Financial Records cont'd		
Bank Draft	7 Years	To be retained at the parish
Bank Reconciliation	7 Years	To be retained at the parish
Bank Statement	7 Years	To be retained at the parish
Cash Book	7 Years	To be retained at the parish
Cheque Register	7 Years	To be retained at the parish
Cheque (Cancelled)	7 Years	To be retained at the parish
Givings Envelopes	6 Years	To be retained at the parish
Financial Statement (Monthly)	7 Years	To be retained at the parish
General Ledger	Permanent	This should be part of the annual financial statement included in the vestry report
Insurance Records	Permanent	Policies are usually on an annual basis and cover parish assets (buildings, contents, auto) and liability exposure
Receipts	7 Years	To be retained at the parish
Duplicate Official Receipts	3 Years	The same retention applies to any records necessary to verify these receipts
Tax Return	7 Years	To be retained at the parish and the same retention applies to any records necessary to verify the tax return
Documents relating to Building and Equipment		
Building Plans, Surveys and Valuation Reports	Permanent	A copy should be sent to the Archives
Deeds	Permanent	Copies should be sent to the Archives

Record Type	Retention Period	Comments
Documents relating to Building and Equipment cont'd		
Licenses (use of space, etc)	Permanent	A copy of the license should also be sent to the archives for the property file.
Building Inspections	As long as the building is owned or in use	To be retained at the parish
Equipment Service Contracts	As long as the equipment is owned or in use	To be retained at the parish
Personnel		
Payroll Records (T4s, CPP and EI deductions, etc)	7 Years	To be retained at the parish
Personnel Policies	Permanent	
Personnel Files (incl. Screening Files, performance reviews, etc)	Permanent while active.	Contact HR dept for advice re: culling file after change in employment
Parochial Operations		
All policies and bylaws	Permanent	Even policies that have been superseded by later versions need to be permanently retained
Vestry Report	Permanent	These should be forwarded annually to the Diocese as part of the parochial returns package and must include annual financial statements, and the auditor's report
Minutes of Meetings	Permanent	Includes vestry, advisory board, ACW and any other groups or organizations within the church
Parish Profiles	Permanent	These documents, compiled when the parish is seeking a new incumbent, are an excellent 'snapshot' of a parish

Record Type	Retention Period	Comments
Parochial Operations, cont'd.		
Pew bulletins/leaflets	Permanent or selective retention	Can be a valuable historic resource. Select samples and/or special events if space is limited
Pictures	Permanent or selective retention	Must be labeled and include names and dates, where appropriate
Parish Newsletters	Permanent	Complete sets are a valuable resource
Parish Histories, anniversary booklets, etc	Permanent	An anniversary is a good opportunity to transfer files to the Archives!
Bibles, Prayer Books, etc	As long as they are in use. Copy any relevant notations	These are not 'records' and cannot be accepted by the archives unless they are unique in some way directly pertaining to the Anglican Diocese of Toronto

In Summary, the following records are of an historical nature and should be deposited in the Diocesan Archives for permanent retention:

Parish Registers

- All baptism, confirmation, marriage, burial and service registers.

Financial/Business

- Annual reports to vestry, including annual financial statements
- A copy of the title deed for parish property
- A copy of the plan of survey
- A copy of the building plans

Parochial Operations

- Policies and bylaws
- Minutes of Vestry, wardens, parish groups and organizations
- Pew bulletins/leaflets
- Parish profiles, newsletters, histories and anniversary booklets
- Pictures, if well labeled with dates and names