

## Anglican Diocese of Islands and Inlets

### Records Retention Schedule: Parishes

This records retention schedule was created to be compliant with government legislation, and diocesan and parish business needs. Archival records must be transferred by regular schedule to the Diocesan Archives. Transfer is recommended at least every 5 years with Parish Registers being transferred upon completion. Contact the Diocesan Archivist for any questions.

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

Record Type	Retention Period	Comments
Parish Registers	Permanent	Transfer to archives when completed. Includes baptism, confirmation, marriage, and burial registers. Keep current volumes in parish.
Vestry Registers (Service)	Permanent	Transfer to archives when completed. Keep current volumes in parish.
<b>Financial &amp; Business Records</b>		
Annual financial reports (Reviewed or compiled)	Permanent	To be included in Annual Vestry Report and transferred to archives.
General ledger	Permanent	Retain at parish
Banking		
Deposit slip	7 years	Retain at parish.
Bank draft	7 years	Retain at parish.
Reconciliation	7 years	Retain at parish.
Statement	7 years	Retain at parish.
Cash book	7 years	Retain at parish.
Cheque register	7 years	Retain at parish.
Cancelled cheque	7 years	Retain at parish.
Offering envelopes and logged entries	Envelopes: Current year + 1 year Logged entries: 7 years	Retain at parish.
Monthly financial	7 years	Retain at parish.
Receipts	7 years	Retain at parish. (Make copies of any thermal paper receipts)
Tax return	7 years (same period applies to any supporting records for verification)	Retain at parish.
<b>Buildings &amp; Equipment</b>		
Building plans, surveys, valuation reports	Permanent	Transfer originals to archives, retain copies at the parish if desired.
Cemetery registers, agreements, sales records	Permanent	Transfer originals to archives, retain copies at the parish if desired.
Cemetery plot diagrams & plans	Permanent	Transfer originals to archives, retain copies at the parish if desired.
Cemetery databases	Permanent	Retain at the parish. Send a copy to the archives every few years or after a significant update.

Leases, user agreements	Life of agreement, plus 3 years	Retain at parish.
Building inspections	As long as building is owned or in use.	Retain at parish.
Equipment service contracts	As long as equipment is owned or in use.	Retain at parish.

### Parochial operations

Annual Vestry Report	Permanent	To be forwarded annually to the archives (package must contain annual financial report).
Minutes of meetings: Parish Council, Vestry, Advisory board, etc.	Permanent	Transfer to archives. Ensure transferred minutes are the final version.
Pew bulletins & leaflets, parish newsletters, photographs	Selective retention	Transfer selected items of importance to archives.
Histories, anniversary booklets	Permanent	Transfer 1 copy to archives.
Bibles, prayer books	Retain as long as they are in use	Retain at parish.

### Records Management best practices:

- It is important that we protect both physical and digital records. Locking cabinets, restricting access and using strong passwords are all very important. Provincial legislation (the Personal Information Protection Act) mandates our responsibility for the security of personal information we collect or acquire. Limit access to documents containing personal information or confidential parish information.
- Maintain a regular records management schedule. Keeping up to date with records management will reduce the possibility of lost records, confusion, and time spent sorting through large groups of files in the future.
- In the case of shared key documents at the parish (eg: Parish Council minutes) a master copy should be kept by a designated creator or main contributor (eg: Parish Council Secretary or Rector's Warden) responsible for ensuring a final, complete set.

#### Reminders for digital records:

- The same retention schedule applies to both paper and digital records. Digital documents of permanent value to the Diocese should be saved and forwarded on a regular basis to the archives.
- If you use a combination of digital and paper for the same document (eg. Pew bulletins designed on the computer and printed for distribution), determine whether the digital or paper version will be maintained as the final/official record. Do not send both a digital and paper copy of the same document to the archives, except for any complete scans of parish registers.
- Be mindful of format when sending digital records to the archives. PDF is best for text documents, while TIFF (if available) or JPEG is preferred for photographs.
- Use consistent naming conventions that identify what the document is, the date [yyyymmdd], and the version (if relevant). Consistent formatting means a helpful and logical order for searching. Suggested file name format: ParishCouncilMinutes\_20250324\_Final
- Include the file name in the footer of documents.