

Anglican Diocese of British Columbia

Records Retention Schedules - Parishes

Key documents *

Archival records must be transferred by regular schedule to the Diocesan Archives. (Parish Registers upon completion.)

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	Baptism, confirmation, marriage, burial - current volumes in parish, all other volumes sent to archives for permanent retention
Vestry registers (Service) *	Permanent	Records of services, attendance, offerings. Completed sent to archives
Financial Records & Business Records		
Audited financial reports	Permanent	part of annual statement to be included in vestry report
Balance sheet	Permanent	part of annual statement to be included in vestry report
General ledger	Permanent	part of annual statement to be included in vestry report
Insurance records	Permanent	annual policies covering parish assets e.g.: buildings, contents, auto and liability exposure
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 or logged entries	2 years	retain at parish
Monthly financial	7 years	retain at parish
Receipts	7 years	retain at parish
Duplicate official receipts	3 years (same period applies to any supporting records for verification)	retain at parish



This was changed in 2016 to a period of 6 years following the end of the last taxation year to which the envelope relates.

Tax return	7 years (same period applies to any supporting records for verification)	retain at parish
Personnel files Payroll records (T4, CPP & EI, etc. Screening files, performance reviews Policies	Permanent - while active 7 years 3 years after last action Permanent	retain at parish cull after changes in employment retain at parish
Buildings & equipment		
Building plans, surveys, valuation reports*	Permanent	retain at parish, secure copy to be sent to archives
Cemetery records* plot diagrams & plans, registers, agreements, sales records	Permanent	retain in parish, with copies of plans, plot diagrams, e.g.: updated versions to archives regularly
Deeds *	Permanent	(Canon 6.3 - All buildings and lands of the Diocese shall be held in the name of the Anglican Synod of the Diocese of BC) retain copy and send to archives
Licenses (space rental)	Life of agreement, plus 6 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		
Policies & bylaws	Permanent	Even those superseded by later versions need to be permanently kept - send to archives
Vestry report *	Permanent	To be forwarded annually to the Diocese (package must contain annual financial statements & the auditor's report)
Rector' correspondence, Wardens	Permanent, subject to review	Send to archives, for reasons of space, interpret to mean selected documents of relevance
Minutes of meetings*	Permanent, signed copy to archives	Vestry, advisory board, ACW and any other groups or organization within the church
Parish profiles	Permanent	retain in the parish

Pew bulletins & leaflets	Permanent or selective retention	samples or special events sent to archives
Parish newsletters	Permanent	retain in parish, selective copies to archives
Histories, anniversary booklets	Permanent	1 copy to archives
Bibles, prayer books	Retain as long as they are in use, copy relevant notations	Retain in parish

Electronic Files

Password protect files.

Provincial legislation mandates our responsibility for the security of personal information we collect or acquire. Limit access to documents containing personal information.

Adhere to established policy as to what should be kept and for how long.

Electronic copies of a record that must be kept for legal or tax purposes are retained in the parish for the duration of that period and do not ever get transferred to the archives.

Electronic documents of permanent value to the Diocese of British Columbia are saved along with the identifying metadata* and forwarded on a regular basis to the Diocesan Archives.

In the case of shared key documents (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 complete set.

Ensure compatibility of existing data to updated systems & hardware.

Suggested format for files = Name : eg minutes, (Parish Council) report (Fabric Committee)

Date : eg: meeting, document in format yyyyymm (200805120

or yyyymmdd (20080512)

Versions & volume #'s should be included in any file name (Fabric Committee report 20080512 .doc.v.1

Consistent formatting means a helpful and logical order for searching

Add file name & path to the footer of every document you create once saved. This helps to identify a paper copy and indicate where the electronic can be found.

If there is a parish website , you may capture master documents from the website in hard copy- Snapshot website 2 to 3 times a year depending on how frequently the site is updated.

*metadata: A text document's metadata may contain information about how long the document is, who the author is, when the document was written, and a short summary of the document.elements such as version number, archiving date, and other technical information for purposes of file management, rights management and preservation.

Resource link : <http://www.cra-arc.gc.ca/E/pub/tp/ic05-1r1/ic05-1r1-e.html>

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