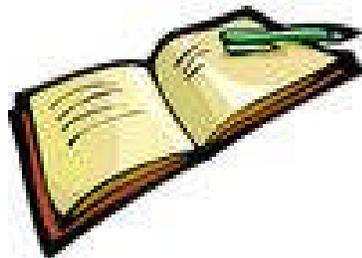


**The Archives of the  
Diocese of Nova Scotia and Prince Edward Island**



***Managing Parish Records***



*Summer 2005*

# Anglican Diocesan Archives

## Guidelines for Managing Parish Records

### Introduction:

The Diocesan Archives normally accepts all records *of enduring value* when they become more than 10 years old. These are the ones we recommend keeping in the following pages. We will also take deposits of more recent Parish Registers when they are “finished” or closed within the past ten years.

With the recent occurrence of church closings, amalgamations and re-alignment of parishes, the Archives has made a change to its Acquisition Policy to prepare for taking custody of larger volumes of parish office files, as well as Diocesan and Bishop’s Office files.

This added policy simply requires that large volumes of church files to be deposited should be weeded, arranged coherently, and accompanied by as much “contextual material” as possible (who created them, why, where they originated) and hopefully, boxed and labeled.

In the wake of a recent recovery of damaged records in 2004, we have also included policy that encourages parishes to preserve and monitor the condition of all their records – all will be appraised before depositing for any “unhealthy” condition and those that need treatment will be assessed and treated before adding to the Archives holdings.

By “managing” your parish records you not only preserve history, but also save space, increase organizational efficiency, saving work and time when locating information.

Since you can charge a fee for search time, photocopies, certified copies and duplicate certificates of baptisms, marriages, confirmations, and burials, finding things faster is an advantage.

(See the Archives [Access Policy](#) for parish records – procedures and restrictions on providing copies).

Now, with scanning and Email, copies from any of your records that are held at the Diocesan Archives can be sent to you very quickly -- simply email: [archives@nspeidiocese.ca](mailto:archives@nspeidiocese.ca) or call Lorraine Slopek: (902) 420-0717 voicemail: 231

*When sorting through your records, remember:*

*Living People are more important than records:* Never take risks when you are handling old, dusty or neglected records – at least wear a cheap dust mask or kerchief over mouth and nose, cotton or latex gloves, and safety glasses or regular eyeglasses. Wash your hands and change your clothes after working for a long time with large amounts of records.

*But ... Records are ABOUT people:* We need to create them and we need to preserve them to bear witness to the life of the Church. We can make the job easier by starting to preserve records from the point of “creation” and continuing until they are archived. Remember that *neglecting* records can not only eliminate somebody’s story, but also be dangerous to your health and the health of those around you.

## Part 1. VITAL (ARCHIVAL) CHURCH RECORDS -- WHAT TO KEEP AND WHY:

The older each type of record is, the more valuable and rare it is now, but we should bear in mind that whatever we are producing *now* will tell a story fifty or several hundred years from now.

The following are considered of enduring and permanent value as both a corporate history and a cultural history of the individual parish community and of the Diocese and the larger Church community. All of these can be deposited to the Diocesan Archives:

### ***KEEP, PRESERVE AND PROTECT -- OR ARCHIVE:***

#### **A: Vital Parish records (vital to operation *and* to history):**

**Registers of baptisms, marriages, first communion, confirmations and burials** (and loose pages or notations of same information).

#### **Registers of services**

**Minutes of annual meetings, monthly meetings:** Includes Congregation, Vestry and Parish Council meetings, committee meetings, and any parish organizations, groups, societies and guilds that have taken minutes.

**Clergy documents** - licences, inductions, ordinations, letters bene decessit, letters testimonial; also sermons, correspondence, pictures, journals, diaries, scrapbooks (clippings), and articles they wrote or that were written *about* them.

**Sunday school rolls,** attendance, collections. Library records.

**Annual reports** -- of the parish

**Service Leaflets, parish histories, newsletters,** -- keep one copy of each in a permanent file. (NOTE: If your church has many services per week, you may not want to keep all service leaflets – preserve those of special services, ordinations, visiting Bishops, anniversary celebrations, dedications, etc.)

## Legal and financial records:

Any corporation in Canada is required to keep financial records necessary to its ongoing operation for audit purposes for 7 years, after which they may be destroyed. Some Church financial records have a *longer* historical value:

### KEEP –

- Annual financial reports
- Ledgers
- Cash books
- Subscriptions, offerings, pew rents (in registers, note-books or loose leaves)
- Receipts older than 100 years – *or those that tell a story of an agreement, conditions of labour, people's names, and so on, written on the receipt.*
- Legal documents (property, insurance, contracts, agreements)

### For historical interest, take special care of:

- **Old ledgers** and **subscription books** that have to do with the building of the church,
- **Pew rents**, grave lots, cemetery diagrams and perpetual care accounts
- Glebe and other **land and church property documents**.

### KEEP ALL copies of:

- **Deeds, mortgages and wills affecting property, any legal documents of financial transaction – insurance policies, contracts, leases, conveyances, work orders, agreements, parish boundary decrees, parish formation and division resolutions and instruments, consecration petitions and sentences – and all correspondence and memoranda relating to these.**
- **Architectural plans, drawings, maps relating to property**
- **Lists of artifacts and heritage objects, memorial and their descriptions, and photographic records of objects for insurance reference.**

## **B. Some considerations for history, preservation and archiving:**

**Pre-1900:** Hand-written financial records can be of historical value. The Archives will collect early handwritten receipts, agreements, contracts, leases, bills and so on because they tell a story and they are usually small.

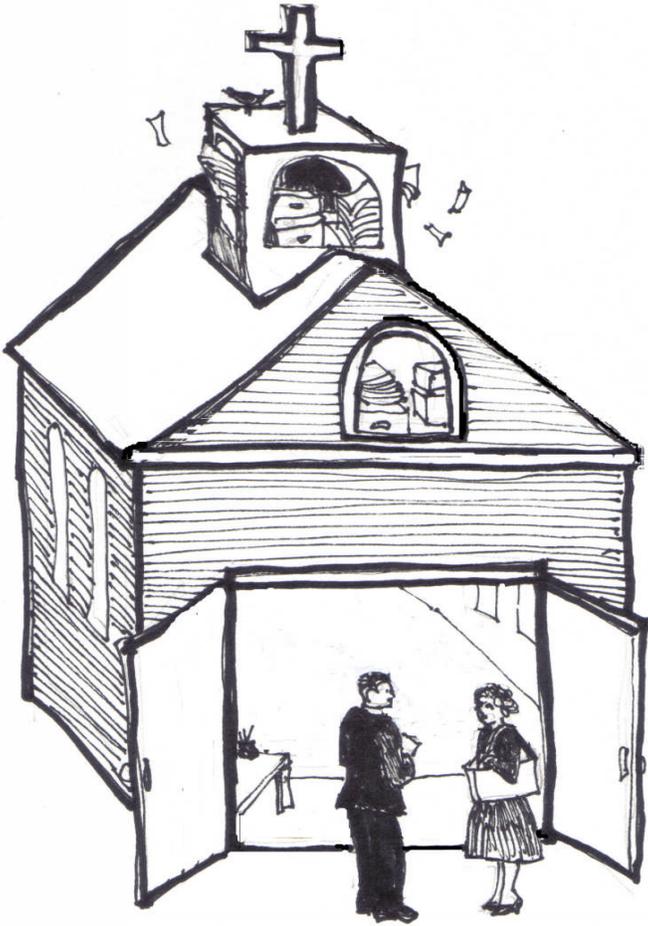
If you don't have a ledger for a certain time period, then keep all financial documents that you have for that period.

**Keep All Manuscript records** (meaning: original records, whether hand-written or typed).

 ***Preservation Tip:** When writing in registers, don't write to the very edge of the page or anywhere in the margins. The edge of the page is the first area to deteriorate with age, and whatever you write there will probably be lost.*

**Publications:** Don't throw it away if it is from the Church of England or the early history of the Church in Canada or in our Diocese (Examples: Society for the Propagation of the Gospel in Foreign Parts (SPG), Society for the Propagation of Christian Knowledge, Church Work, any old parish magazines from other parishes in our Diocese or from other dioceses (we can contact other archives to see if they need them).

*Don't throw any publication away if it is very old – check with the archivist to see if it is rare.*



*"Well, I'll be going now, Father ... um ... whatever you do, don't ring the bell!"*

### C. What to throw away:

After 7 years, you can throw away "modern" (Post-1900) cheque stubs, receipts, invoices, and statements ***as long as the figures are recorded elsewhere*** -- in ledgers, annual reports and budget summaries.

Modern receipts need not be kept after their corporate retention period is ended, ***unless it is determined that they are the only record of the information - for instance, if the ledger is lost.***

You can throw away duplicate copies of the following:

- Annual Reports and Statements,
- Typed minutes, memos, and legal or official correspondence.
- Any other documents that are carbon copied without added changes.

**AGAIN:** If in doubt, it is safest to keep all copies of primary legal documents such as deeds, wills and decrees, clergy documents - some are drafts and may be worded differently or have notes in margins - this tells historians something.

## **Part 2. OTHER PARISH OFFICE RECORDS:**

### **A. Office Files:**

Depending on the size and number of staff using the church office, you may have all current active records plus many inactive records stored together, some of which take up a lot of room and can be weeded. (Registers should always be stored separately in a fireproof, dry and secure vault.)

The Diocesan Archives, at this time, does not have a suitable space for large volumes of Parish office files, but we may have a new facility within the next few years (2007?). Until then, in the unhappy event that a church closes, the Archives will take its church office files if they are in order and weeded down to minimum bulk.

To save space and prepare for depositing:

- **Weed out all duplicate copies of correspondence, memos, and reports**
- **Destroy out of date temporary materials as they accumulate**
- **Re-assess usefulness of catalogues, suppliers, services, and advertisements when they become out of date**
- **Arrange by date: service leaflets, published material, newsletters, financial statements and reports**

### **SAVE ALSO: for your own use and for archiving:**

- Music sheets and scores
- Scrapbooks –historical, made by clergy or others active in the parish, of world at large, of community or church + parish events.
- Parish magazines and newsletters (file by date)
- PARISH HISTORIES, Oral Histories, published articles (for reference, always include the issue number and date on photocopies from periodicals and newspapers.)
- Lists of rectors and the dates they have served in your parish, whether published or draft form.
- Lists and descriptions (photographs) of memorials and other “material heritage” objects
- Photographs, negatives, slides, single or in albums.

## **B. Digital records:**

Make backup discs of all your important files and store off-site. 3.5" floppy diskettes are still good to use – they are less vulnerable than compact discs in some ways, and we know their longevity, but of course they have smaller storage capacity than CDs.

**Email: While some Email messages are of temporary value, many of our older paper records of enduring value, *correspondence* in particular, have been replaced by Email!**

- Make hard copy of only those emails that contain valuable information for reference or where the message is being used as a document. Make hard copies of attachments for filing according to the type of document..
- Save attachments as soon as you receive them: a quick way: Right click attachments and "save-as" to your preferred folder location.

*OR -- Just in case, save ALL old email digitally as a backup:*

### **"Archive" or "Auto-Archive" feature in Microsoft Outlook:**

This saves the email and attachments as data – just the way they are in your current window, but stored in a file named "archive" within

"Documents and settings\owner\local settings\application data\Microsoft\outlook\archive.pst". There is an opportunity under "Browse" to name your own folder, but it saves the whole folder at one time and deletes the items from your current folder.

**Text-file storage:** If you have saved all your attachments, and just want to back up your messages without using a lot of storage space, use this method:

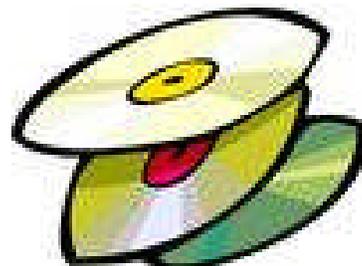
Sort your **Inbox** Email by date, select a date range of messages, and choose FILE > "SAVE AS" , then choose the file type: text file (file extension .txt -- I save mine into document folders labeled by month and year. This will not delete your selected messages from your email folder – that is another step.

**WARNING:** The message will **lose all attachments** from the original email in the "text-file" saving process. Be sure to save all your attachments to other folders on your hard drive **before** deleting these emails!!

Then do the same with your **Sent** items – your final answer tells the whole story!! **You don't have to worry about repetition of message content because text (.txt) files take up only a few kilobytes** each and you can search them fairly quickly by keyword.

You can also do this by sorting by Sender or by Recipient, instead of by date. Unlike paper, these take hardly any more space when saved (duplicated) in different folders, grouped in different ways.

If you have created other email folders, do them all – but remember to label the new text file with the same word(s) used to name your personal folders.



## **BACKING UP all digital files and systems:**

**BACK UP EVERYTHING:** If your computer has the features, make a set of system backup discs or renewal discs; make backup copies or “archive” email and other documents to 3.5” floppy discs or CD write-able discs. Keep covered in anti-static sleeves or cases, preferably in a dry cool place -- ***off-site***.

 **NOTE:** Archivists do not yet know the lifespan of **computer storage discs**. We know that some have lasted 20 years, but only with careful storage, but there is still paper and ink that have lasted more than 2,000 years – we are a far cry from saying that about plastic and metal!

In fact, **all computer storage methods and devices are considered ONLY FOR BACKUP.**

**PHOTOGRAPHIC IMAGING:** Digital image files are not acceptable as a method of preservation for photographs; even the most vulnerable photographic emulsions and papers have lasted longer than magnetic and laser digital recordings.

NEVER DISCARD THE ORIGINAL PRINTS, NEGATIVES, FILMS and SLIDES. Store within “neutral” boxes, film cans or envelopes (what the photo shop gave you) in a cool, dry, place – ideally an enameled metal cabinet.

**So, for now ... keep a hard copy of records of enduring value.** You can buy acid-free copy paper now at Staples (it is only slightly higher in price than regular paper.)

**Databases:** Do the same as above with all of your indexes, and databases, parochial statistics – backup on disc and store

in a location ***away from*** your paper files and the computer (if something happens in one place, you still have the other!)



*And last but not least ...*

### **C. What to do with those Diocesan parish mailings:**

**Don't** file it all under "diocesan mailing"!! (It's tempting...but causes more work in the end – it is easier to sort through a *small* amount of paper than a *large* amount at one time)

Except for personal/financial items particular to the parish, almost all of the clergy mailing is temporary reference material and the originals are stored at the Diocesan Office. ***You don't need to keep it forever*** – (except for Archives Committee guidelines and newsletters, of course).

Suggestion: SET UP A TEMPORARY FILE holder or drawer that is within easy reach. Separate each type of thing as soon as you get it --: Bishop's messages, financial material; Individual committee documents: (File under each committee), and so on – then you can find each thing more easily when you do have time to read it – or give it to someone else to read! (Appropriate Council member or parish leader)



***Preservation Tip***: Use a soft sharp pencil to code each type of document for filing (top right corner), being careful not to write over any information. Graphite lasts longer than ink and does NO harm to any type of paper

Announcements – post in view immediately – if you don't have time to read them – someone else will!

Keep temporary reference at the front of the file drawer to access frequently – check once a month to WEED temporary material as soon as it is out of date

**Good news**: More and more of these will come to you by Email in future, or be available as documents on the website and will take less room to store.

## APPENDIX: *quick reference notes*

### What the Archives does not collect:

We *would rather not* take a large accumulation of parish office files that is not weeded or has not been kept in a reasonable order. Our determination of the original order would not reflect the life of the parish accurately; sorting and weeding is done best by the "creating body" – the parish -- *before* archiving.

Once a file is archived, basic archiving principles keep us from changing the internal order or arrangement. (For all budding archivists out there, this is called "*respect des fonds*".) If we change it, we could obliterate the context in which it was created ("*provenance*").

We also cannot accept records that are dirty, mouldy, or left unprotected for a long time, *until after* their condition has been appraised, corrected and found to be safe to add to our holdings. **(Don't throw them away – ask us first!)**

We do not collect artifacts.

We do not collect Hymn Books, Prayer Books, or Bibles, unless it is one that has an historical significance to our diocese.



**Preservation Tip:** *To avoid damage, try to WEED your office files regularly for out of date or duplicate material, and number and label the boxes when you move them out of the way.*

Files that "grow" in bulk unchecked are often not well cared for and get out of order -- shoved in attics, basement, under stairs, in church bell towers, rectory porches for lack of space — these may get damp and dirty or "go missing". They are also a very common cause of **FIRE**.



### Summary of what you can throw away:

**Post-1900:** Receipts, cheque stubs, invoices.

Duplicate copies of any reports and publications

Temporary papers (notices, announcements, memos)

Duplicates of posters, brochures, leaflets -- if no one else wants them as mementos.

...and any duplicate copies of other office files.

You could throw away published material that was collected BY YOUR PARISH but that we already have in the Archives or that was published elsewhere (we have a full run of Diocesan Times and Diocesan Yearbooks) but you may want to keep them for reference. The content of these publications is extremely valuable for researching the history of our Diocese.

## **Summary of Storage Guidelines:**

Paper records should be kept in a clean, dry, cool place (17-20 degrees Celsius and 35-50 RH, ventilated, but with a minimum of temperature and humidity fluctuation) that is safe from flood or fire, humans, and other pests.

Make shelving 3-4" from the floor at least and NOT next to heaters, cleaners, paints, glues and solvents.

**Store photographs separately from paper records.** Photos can be well preserved in polyethylene or polypropylene sleeves ("page protectors" at Staples) and binders (*not vinyl*) and are better off at a cooler temperature than paper, and in enameled metal cabinets. **TO BLOCK LIGHT.**

**The photo emulsion from prints, negatives and films will "off-gas"** so do not seal a plastic enclosure or a metal cabinet airtight (most of them have little holes in the shelves for this reason).

You don't have to remove prints from albums, if the album paper is archival quality (not fading, curling or crumbling).

**Films, audio and visual tapes, and plastics** will fuel a fire, so they should also be stored separately from paper and kept cool.

**NEVER put registers or books in air-tight plastic.** Don't even cover the binding with it. Paper, leather and cloth always take moisture from the air and need to breathe; sealing them will accelerate mould.

When transferring or transporting records -- **never place them in a garbage bag or grocery bag** -- they can be mistaken for something else! (This has happened!)

Always clearly **label the boxes** or other enclosures – this also prevents loss.



***Preservation tip:*** Don't use "permanent" markers to label boxes – these have a *solvent* in the ink. Use non-toxic or any non-permanent marker, wide dark pencil, or printed sticky labels.

**For purposes of *Archiving*,  
the General Rule of Thumb is:**

**WHEN IN DOUBT, DON'T THROW IT OUT.**

Call the Diocesan Archives to bring it in and show it to us.

Reach the Diocesan Archivist (Lorraine Slopek) at:

(902) 420-0717 **Voicemail:** 231

**Email:** archives@nspeidiocese.ca

We are located at:

Anglican Diocesan Centre  
5732 College Street, Halifax, NS  
B3H 1X3