

Five Things Congregations Need to Know about Records by Diane Wells

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1. Records matter. Records bear witness when we no longer can. Just think about how little we would know if we didn't have records to rely on. Where does our knowledge come from if not from records? Records matter. Records inform the future.

2. Some records matter more than others. Some records stand the test of time. Others have a shorter shelf life – important for a while but with a built-in obsolescence. Others are transitory and have little value beyond the immediate information they impart. Among those that matter more are:

a) Sacramental records. Our parish registers are perhaps our most important records as they provide an authentic record of our baptisms, confirmations, marriages and burials.

b) Legal and financial records. These include such items as Articles of Incorporation, Deeds, Contracts, Endowments, Bequests and Pledges, which establish our legal foundation and provide for our financial stability.

c) Administrative records including minutes, policies and procedures and correspondence make day-to-day operation possible.

d) Historical records, like parish histories, diaries, and newspaper clippings, tell the story.

3. Records require protection.

a) Physical protection. Records come in a variety of formats and they all require physical protection, such as proper storage containers and environmental controls, and secure on- or off-site storage and appropriate access.

b) Intellectual protection. Records also require intellectual protection. Many records we commonly deal with contain confidential information. Examples include correspondence, personnel records, membership lists, pledge and donor information and parish registers. While the information is available to the person named in the record, the diocese must comply with the BC Personal Information Protection Act. Not only does this restriction protect an individual's privacy but it also protects against the all too common crime of identity theft. Please note that these restrictions on access to parish registers apply to all congregations.

4. Records provide protection. Some records are very important in our endeavour to manage risk. Insurance policies and inventories are obvious examples. Legal and financial documentation provide evidential proof that enables us to substantiate claims, authenticate our legal existence and, if necessary, recreate assets after a loss. Another important type of record is policy and procedure documentation. If it can be shown that appropriate policies are in place, and that their procedures have been followed, there is a much better chance of a favourable result in any litigation.

5. Records must be managed. It is important to develop records-management programs for your parish, especially with the exponential growth of electronic records.