

# PARISH AND SCHOOL RECORDS MANAGEMENT POLICY

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**COURAGEOUSLY**  
*Living the Gospel*

## **ACKNOWLEDGEMENTS**

In gratitude for permission to use the many different models of Parish and School Records Management procedures and polices created by dioceses across the United States, the Office of Archives and Records for the Diocese of St. Petersburg would like to thank them for sharing their expertise and professionalism in the creation of these proper record-keeping practices.

We are also grateful to the members of the Association of Catholic Diocesan Archivists (ACDA) who consistently share in educating and advocating the necessity of Archives as prescribed by Canon Law in all dioceses. In addition, we thank Bishop Gregory Parkes, Monsignor Robert Morris, Vicar General and Deacon Rick Wells, Chancellor, for their ongoing support, as well as the employees of the Pastoral Center, Parishes and Schools of the Diocese, who have provided invaluable and constructive suggestions during the planning of this policy. Their willingness to generously give of their time and talent is a true example of Courageously Living the Gospel.

**"Stand firm in the faith, be courageous, be strong."  
1 Corinthians 16:13**

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## FOREWORD

by  
Most Reverend Gregory Parkes  
Bishop of St. Petersburg

This *Parish & School Records Management Policy* has been created to assist our parishes and schools in preserving the artistic and historical patrimony of the Diocese of St. Petersburg. Each of the 74 parishes, 6 missions and 48 schools of the Diocese have a great responsibility to diligently procure, protect and preserve their historical records. Documents of historical value are to be carefully kept, organized and placed in secure and safe storage areas. Many historical records contain primary source documents that show the function and growth of the parish and school. These important records are preserved because of their enduring cultural, historical or evidentiary value. Parish and School archival records are normally unpublished and almost always unique, unlike books or magazines for which many identical copies exist.

This policy has been created to assist with establishing archives and maintaining records that document the life and breath of our local church through photographs, oral histories, audiovisual materials and architectural drawings to name a few. An archival record preserves data that is not intended to change. In order to be of value to society, archives must be trustworthy. Therefore, it is our responsibility to authenticate archival materials, such as historical documents and to ensure their reliability, integrity, and usability. Archival records must be what they claim to be; accurately represent the activity they were created for; present a coherent picture through an array of content; and be in usable condition in an accessible location for future generations wishing to perform research or gain knowledge of how our parishes or schools came to be.

The information contained in this policy may not cover every complexity of maintaining historical records or have all records listed in its retention schedule, thus when questions arise, consultation with the Office of Archives and Records or the Office of the Chancellor may be necessary.

We are grateful to those who prepared this document, to those who will use it and to the dioceses whose handbooks served as models and guides in its creation.



Most Reverend Gregory Parkes  
Bishop of St. Petersburg  
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## INTRODUCTION

The purpose of this publication is to provide parish and school staff with an introduction to the basic principles and procedures related to the creation and maintenance of an archives and records management program. An archives helps those served by our parishes and schools to better understand Christian culture and to appreciate the history of their community. The parish and school records of the Diocese of St. Petersburg are unique and are not found anywhere else in the world. Unlike a library where a book can be re-ordered if lost, records of parishes and schools in the Diocese of St. Petersburg will be gone forever if not preserved and maintained according to archival standards.

## **ESTABLISHING ARCHIVES AND MAINTAINING RECORDS**

### **1. In accordance with the Code of Canon Law, Can. 491 and 535, each parish and mission is to establish and maintain an archive.**

*Can. 491 §1. A diocesan bishop is to take care that the acts and documents of the archives of cathedral, collegiate, parochial and other churches in his territory are also diligently preserved and that inventories or catalogs are made in duplicate, one of which is to be preserved in the archive of the church and the other in the diocesan archive.*

*Can. 535 §4. In each parish there is to be a storage area or archive, in which the parochial registers are protected along with letters of bishops and other documents which are to be preserved for reason of necessity or advantage. The pastor is to take care that all of these things, which are to be inspected by the diocesan bishop or his delegate at the time of visitation or at some other opportune time, do not come into the hands of outsiders.*

- a) The term “archives” refers to the non-current records of an organization or institution, preserved because of their continuing permanent or historical value.
- b) The term “archives” may also refer to the physical plant or building where such materials are located.
- c) The materials found in the archives document the growth and history of the local parish or school. Institutional archives usually contain records such as correspondence, meeting minutes and memoranda that were created to support daily business transactions.
- d) In addition to the written record, the archives may also contain artifacts, such as altar linens, vestments and liturgical objects and photographs that illustrate the nature and development of the community.

### **2. A records management program is necessary for legal, administrative, fiscal, historical and canonical reasons.**

- a) Records management pertains to the administration of a program that supports the systemic creation, organization, maintenance and disposition (or reading and weeding) of the records of parishes and schools.
- b) With the passage of time, a successful working records management program will feed into parish or school’s established archives.

### **3. The records management program must identify records that are permanent or archival and sees to the transfer of those records to the archives.**

- a) Once records have been placed in the archives, proper identification and preservation can take place.

- b) To ensure organization, a thorough inventory of these records must be created.

**4. An archives and records management policy is to be created in order to clearly outline the program and the scope and content of the archives and allow for the coordination of records management with the archives.**

The following is a sample policy statement that may be adapted to particular needs:

- a) *Sample Policy Statement:* The purpose of the archives of *[Name of Institution]* is to collect, organize, preserve and make available for research, the official records of *[Name of Institution]*. The purpose of the records management program is to ensure that the active and inactive records of *[Name of Institution]* are managed in a manner in keeping with the standards of the records management profession and to ensure the transfer of the appropriate records to the archives. The records management and archives program is established in accordance with the Code of Canon Law, Can. 535, §4, which states that each parish is to have a registry or archives in which the parish books are kept along with episcopal letters and other documents which ought to be preserved due to necessity or usefulness...
- b) “Other documents” may be defined as any recorded information (including artifacts and photographs) regardless of format (printed or electronic) that are made, received or maintained by *[Name of Institution]* as a result of conducting business or pursuing legal obligations and have been determined to be permanent or historically significant by the records retention schedule or basic appraisal criteria. In accordance with canon law, the pastor is responsible for the records of a parish, mission or parish school. This responsibility has been delegated to *[Name of Institution]* in order to assure the appropriate administration of the program.
- c) A records management and archival program in a parish, mission or school must have adequate support and resources to succeed.
- d) It is recommended that the archives and records management policy be reviewed by the Diocesan Chancellor and Archivist and then submitted for approval to the local pastor, administrator, school principal or appropriate councils prior to promulgation.

**5. To implement the archives and records management policy, it is recommended that the following procedure be followed:**

- a) Locate and survey all records, from sacramental registers to canceled checks.
- b) Create an inventory or list of the records. The inventory would include the name of the file, the date range of materials in the file and the location of the files.
- c) When surveying records for value and disposition, please follow the Parish and School Retention Schedule ([See Appendix A](#)).

- d) The surveys and inventories provide a basis for future decisions, such as revising the current filing system, creating retention schedules and appraising records.

**6. The following criteria for appraisal (or discernment of the records' values) are to be considered when making decisions about the disposition of records: administrative, legal, financial, historical, intrinsic and in some instances, canonical.**

- a) Some records have more than one of these values and some of these values indicate short term records retention over permanent retention or placement in the archives.
- b) Determine which records are active, inactive or archival. Active records are records necessary for current business or those referenced on a daily basis. Inactive records are referenced fewer than 10 times per year of those records that are required to be kept for a short period of time (such as many financial records).
- c) Archival records are those records determined to be permanent or historically significant.

**7. Records created by and for employees of a parish, mission or school, belong to the institution and not to the individual. As such, these records are property of the institution and are to be retained by the institution.**

- a) The majority of the records created during the course of conducting business are not considered confidential but at the same time, are not open to general research without the explicit permission of the pastor or his delegates. Research requests must be in writing with a description of the records requested before a decision can be made as to whether the information is restricted or confidential. There are many records of a parish, mission or school that are confidential in nature. These records may include sacramental registers, marriage records, donor files and medical records. Access to these records is legally and canonically restricted and the privacy of the Christian faithful and the confidentiality of the records must be protected.
- b) Sacramental records and transcripts may not be used to compile membership lists of alumni. This type of information is to be gathered and kept in other ways or formats.

**8. Once records are placed in the archives, proper care is to be taken to maintain their provenance (creating office or individual) and original order.**

- a) Original order is the organization and sequence of records that have evidential value, which were established by the originating office or creator of the records.
- b) If original order and/or provenance has been obscured or destroyed it is recommended that the records be arranged according to function, type, and date. For example: "St. Mary Our Lady of Grace Church, St. Petersburg, FL – Minutes, 1935-1940." It may be necessary to identify further or describe more fully certain records if the parish has a school or the mission has unique aspects that require additional description.



**9. Archival records are to be kept in a stable environment where the temperature does not fluctuate.**

- a) It is vital that the process used to preserve and protect materials does not harm them and that “what is done can always be undone.” Lamination is not recommended as it cannot be undone and can harm documents during the lamination process.
- b) Allowing that the ideal environment for archival records is difficult to achieve, a constant temperature of 70<sup>o</sup> with relative humidity between a minimum of 30% and a maximum of 50%, the following basic steps are recommended to preserve these materials:
  - ✓ Food, beverages, plants (which contain microscopic pests you cannot see) should not be allowed in the processing space or in the archives;
  - ✓ Pencils should be used for notations and labels;
  - ✓ White cotton gloves should be worn when handling photographs so as not to transfer oils from fingers;
  - ✓ Acid free folders and acid free boxes should be used to contain archival materials;

**10. The archives of a parish, mission or school may be located in many places, such as a vault in the parish office or a locking fireproof filing cabinet in the parish office and/or in the school library. A neutral and secure environment is necessary for the preservation and security of the materials in the archives.**

- a) The archives may not be located in the home of an individual or staff member or in any space separate from the physical plant.

**MAINTAINING SACRAMENTAL RECORDS – See:** *Sacramental Records Handbook - Guidelines and Procedures:*  
<https://www.dosp.org/chancellor/wp-content/uploads/sites/9/Sacramental-Records-Handbook-Revised-2019.pdf>

## **ELECTRONIC RECORDS**

**1. Definition of Electronic format means any format other than print, including analog, digital, compact disk, electrical, magnetic, optical, laser, acoustic or any similar technologies, that can be accessed using a personal computer, workstation, local area network, wide area network, intranet, the Internet or other type of network.**

The state of Florida Electronic Records website has further information regarding electronic records:

<https://dos.myflorida.com/media/31109/electronicrecordsmanagementpractices.pdf>

The Minnesota Historical Society also has an excellent and extremely informative “Electronic Records Management Guidelines” recommended by the Archival community at: <http://www.mnhs.org/preserve/records/electronicrecords/erfformats.php>

- a) Some records created or stored on electronic media may be archival, i.e. General Ledgers, Membership lists, Parish Bulletins.
- b) Any electronic records determined to be archival should be printed out and kept in paper format in the archives of the parish, mission or school or steps should be taken to assure migration to new technologies. A Digital Preservation Strategy should be in place for handling long-term electronic records. Information from the Council of State Archivists noted on pages 11 and 12 of this publication contain links to assist in gathering further information.



## **Why You Need More Than Backups to Preserve Records**

From the Council of State Archivists: [www.statearchivists.org](http://www.statearchivists.org)

**“Why worry about electronic records? That’s IT’s job”**

**“If we scan everything we can get rid of the paper and solve our records problem.”**

**“We’re fine, we back everything up.”**

Anyone in a modern workplace has likely heard comments like these. Misconceptions abound surrounding the long-term management and preservation of electronic records. While good backups play a role, much more is needed to ensure records remain accessible far into the future.

**Backups** serve to guarantee short-term continuity of an organization’s operations. They capture a snapshot of electronic records and other information at a certain moment in time, allowing quick restoration after data loss, system crashes, or natural or man-made disasters. They are typically run on cycles where the storage medium (tapes, hard drives, etc.) is reused after a set period of time.

**Digital Preservation** ensures the long-term accessibility, authenticity, integrity and trustworthiness of electronic records so that they can meet the long-term needs of operational mandates, audits, and future research. Digital preservation seeks to manage records so that they will remain usable through many successive generations of technological advancement.

Good backups are a component of any digital preservation system, as are many other aspects of a well-managed IT environment. Those are just the infrastructure surrounding the actual records, however. Digital preservation relies on a system of management where electronic records are tracked, validated, protected and migrated over time. Preservation may involve a combination of software and hardware tools and manual processes, and deals with issues of software and hardware obsolescence, security and file integrity, and the access needs of many different user groups.

**Does your organization have a digital preservation strategy to deal with your long-term electronic records?**

Help and advice is available from the below organizations and others. Check with your state or local archives to find out how you can move from simply backing up your records to preserving them.

**CoSA Electronic Records Portal:** <https://www.statearchivists.org/electronic-records/>

**Library of Congress Digital Preservation:** <http://www.digitalpreservation.gov>

**MIT Libraries Digital Preservation Management:** <https://www.dpworkshop.org/>

**Society of American Archivists Electronic Records Section blog:** <https://saaers.wordpress.com/>



## 10 reasons why electronic records need special attention

[www.statearchivists.org](http://www.statearchivists.org)

1. Managing electronic records is like caring for a perpetual toddler: they need regular attention and care in order to remain accessible.
2. Electronic records can become unreadable very quickly. While records on paper have been read after thousands of years, digital files can be virtually inaccessible after just a few.
3. Scanning paper records is not the end of the preservation process: it is the beginning. Careful planning for ongoing management expenses must be involved as well.
4. There are no permanent storage media. Hard drives, CDs, magnetic tape or any other storage formats will need to be tested and replaced on a regular schedule. Proactive management is required to avoid catastrophic loss of records.
5. The lack of a “physical” presence can make it very easy to lose track of electronic records. Special care must be taken to ensure they remain in controlled custody and do not get lost in masses of other data.
6. It can be easy to create copies of electronic records and share them with others, but this can raise concerns about the authenticity of those records. Extra security precautions are needed to ensure e- records are not altered inappropriately.
7. The best time to plan for electronic records preservation is when they are created. Don’t wait until software is being replaced or a project is ending to think about how records are going to be preserved.
8. No one system you buy will solve all your e-records problems. Despite what vendors say, there’s no magic bullet that will manage and preserve your e-records for you.
9. Electronic records can help ensure the rights of the public through greater accessibility than ever before, but only if creators, managers and users all recognize their importance and contribute resources to their preservation.
10. While they may seem commonplace now, electronic records will form the backbone of the historical record for researchers of the future.

**Remember, archivists are here to help you tackle these difficult problems. Contact your state, local or college archives to find out what they are working towards and what they need in order to make sure that electronic records remain accessible for generations to come!**

## **THE ADMINISTRATION OF RECORDS FOR CLOSED PARISHES**

The following information details procedures for placing parish records in the Diocesan Archives in the event of a parish closing. These instructions should enable you and your staff to accomplish the transfer of records from parish to archives with minimal difficulty and uncertainty. Moreover, you will actively contribute towards preserving the historical memory of the parish. Please remember that parish records are the property of the Diocese of St. Petersburg and may only be placed with a repository designated by Diocesan authorities.

The Associate Director of Archives and Records can offer assistance at every stage of this process and is ready to provide whatever help may be required. If needed, an onsite visit to confer with parish staff on the best methods of completing this undertaking can be arranged.

As you will see from the accompanying outline, the Archives acquires a comprehensive range of parish records. These extend from such vital documents as sacramental records and prenuptial information for marriages to the administrative, financial, property and organizational records as well as memorabilia, parish publications and photographs. Some of these records are essential; all are important in documenting the history of the parish and its community. Not every parish will have all records detailed in the outline, but please send what you have. None of the records should be considered worthless or uninteresting. They were created for a purpose, and it is the Archives mission to document that purpose whether it is sacramental, pastoral or administrative.

Sacramental records are vital parish records. Through them the sacramental life of the parish is documented. All sacramental records are to be transferred to the Archives including baptism, marriage, first communion, confirmation and death and burial records. In addition, we ask that you supply us with prenuptial information on marriages and the parish seal. Those who require sacramental records from your parish will be accommodated by the Chancellor's Office and Archives should a certificate need to be issued.

In addition to sacramental records the administrative, financial, organizational and historical records including parish bulletins and other publications all provide complete documentation of parish life. Correspondence, minutes of meetings, reports, financial records, photographs, property records and all the other types of material listed in the accompanying outline ensure that the history of the parish can be reconstructed. So please be inclusive rather than exclusive in this process. It is better to err on the side of too much rather than too little. Do not purge records of seemingly unimportant material. This is a decision that will be made by the Archivist.

## **PROCEDURES FOR PACKING AND TRANSFERRING RECORDS**

### **Sacramental Records**

Each volume of sacramental records must be identified. Identifiers should include the parish, the sacrament and the span dates of each volume. Such information can be penciled on the flyleaf or on a clean slip of paper inserted into the volume. All marriage files should be boxed with identifying labels including parish, dates and other information necessary to provide easy access.

### **Administrative, Financial, Organizational and Other Records**

The following specifications should be followed in preparing boxes for permanent placement in the Archives:

- As you place records in the boxes, respect the order – or disorder – of your files. Pack records according to your own filing system. Once again, please do not attempt to cull from your files “uninteresting” items. Records should be transferred as you have created and maintained them.
- Use only standard 10”x 12”x 15” sized acid-free boxes if possible. These boxes can be found at Archival supply stores such as [Gaylord Archival](#) and [Hollinger Metal Edge](#). Copy paper boxes, long banker boxes and odd cardboard boxes are unacceptable.
- Transfer records from hanging folders (Pendaflex) and binders to manila folders and retain folder titles, which can be penciled on the tabs. Hanging folders and binders are not records and take up too much space.
- Once records have been packed in boxes prepare an inventory for each box. Use your folder titles in creating the inventory and enclose a copy in each box. Label all boxes with the name of the parish, contents and dates of records enclosed. If you enclose photographs, please try to identify the photos by date, event or subject.
- Do not overload cartons beyond original size.

A one-page checklist of the documents to be sent to the Archives is attached to the end of this set of instructions. Please mark each box with the parish name, contents, number and date range, e.g. “Transfiguration Parish. Correspondence 1959-2019, Box 1 of 2.”

**CHECKLIST OF RECORDS TO BE SENT TO THE ARCHIVES  
OF THE DIOCESE OF ST. PETERSBURG**

1. Sacramental Records  
All baptismal, marriage, confirmation, first communion and death registers. (Make sure the name of the parish is written inside each book if it is not already so marked.)
2. Pre-nuptial Investigations/Marriage files (complete history filed by date)
3. Parish Seal
4. Canonical Documents  
Establishment of parish, parish boundaries.  
Appointments of priests and documentation relating to the Closing of the Parish
5. Histories  
Jubilee/dedication booklets; articles on parish, parish history, history of priests or members.
6. Parish Administration  
Correspondence with Bishop and/or Chancery Officials; correspondence regarding school administration; parish calendars, announcement books and/or bulletins with dates, membership or census lists and annual reports.
7. Parish Organizations (list the name of the organization with the following)  
Organization's articles of incorporation, constitution and bylaws with dates.  
Minutes of meetings (include dates); names of officers and members; financial reports, correspondence, publications, special activities.
8. Photographs (identify with dates and place or activity)  
Inside and outside photos of church building (pencil on back e.g. 1<sup>st</sup> church 1865-70)  
Priests appointed to the parish; parish organizations (with names if possible) and special activities.
9. Building Information and Property Records  
Any other building information not already included in the above reports.
10. School Information  
History of the school and photo of exterior; other information on its role in educating children and youth of the diocese.

11. Legal Documents  
Articles of Incorporation of Parish; deeds to parish property; construction contracts and other contracts or leases; blueprints; tax reports and documents from court cases in which the parish or any of its organizations may have been involved.
12. Financial Records (Current financial records go to the office of Accounting & Finance)  
Account books and ledgers; financial statements; trust and estate correspondence; collection reports; summary reports (indicate range of dates in all categories)
13. Miscellaneous  
Sacramental vessels, Religious artifacts (inventory before packing, wrap carefully, label boxes "Fragile." Clarify ownership: Is this the parish's (diocese's)? Is it the personal property of parish staff? Is it a donated item? Are items to be given to organizations, neighboring churches or individuals?  
Document any transfer of items with specific descriptions, persons involved (addresses, phone numbers).

Other artifacts that would present evidential value about the parish or school or would be of historical value in depicting the life of the parish during that period.



## **THE ADMINISTRATION OF RECORDS FOR CLOSED SCHOOLS**

School records in the Diocese of St. Petersburg shall be administered according to Diocesan policies and procedures.

- In the event of two or more schools being merged into one new school, the school records shall be maintained by the new school.
- In the event of a school's name change as well as its location, the school records will be maintained at the new location.
- If a Parish school is closed, records shall be maintained by the parish. In the event a Parish school changes to a Diocesan school the records will remain on site.
- When a Diocesan school closes, records shall be transferred to the Office of Catholic Schools and Centers and/or the Archives.
- If the school being closed is an Interparochial school, the records may be retained in the parish in which boundaries the school is situated, or they may be transferred to the Office of Catholic Schools and Centers and/or Archives.

These guidelines enable the school staff to transfer records from the closing school to the Diocesan Office of Catholic Schools and Centers and/or the Archives with a minimum of difficulty and uncertainty. Most importantly, this transfer of records will actively contribute towards preserving student records and the historical memory of the closed school.

A one-page checklist of the documents to be sent to the Diocesan Office of Catholic Schools and Centers and/or the Archives is included with this set of instructions.

### **Contacts**

The Diocesan Office of Catholic Schools & Centers will assist the school staff at every stage of the transfer process. The Archivist is available to the Office of Catholic Schools and Centers for consultation regarding the records themselves. If needed, the Archivist will make onsite visits to the school and will confer with the Office of Catholic Schools and Centers and the school staff to develop the best methods for completing this undertaking.

### **Records**

School records document school and student activity. These include a comprehensive range of records from such vital documents as student cumulative records and teacher personnel records to the administrative, financial, legal, property and organizational records, as well as school publications (yearbook) and photographs. All of these records are important in documenting the history of the school.

No records should be considered worthless or uninteresting. All were created for a purpose and it is the Office of Catholic Schools and Centers and the Archives mission to document that purpose whether it is student related, administrative, legal or other. It is possible that not every school will have all the records included in this checklist or on the retention schedule.

## **Guidelines for the Transfer and Administration of School Records**

1. All student records (transcripts for high school, cumulative cards for elementary school) shall be placed in alphabetical order, boxed and sent to the Office of Catholic Schools and Centers.
2. All school personnel records (principal, teachers, staff, etc.) will be placed in alphabetical order, boxed and sent to the Office of Catholic Schools and Centers. These records will be maintained in accordance with Diocesan personnel file policies.
3. All administrative records will be reviewed by the Office of Catholic Schools and Centers and disposition of the records will follow the retention schedules of the Diocese.
4. Access to student records maintained by the Office of Catholic Schools and Centers and/or Archives is restricted. Official transcripts may only be issued to the person named in the record or his/her guardian. The person's or guardian's written consent is required before issuing a transcript to any other person.
5. All records only available in a digital/electronic format will be reviewed by the Office of Information and Technology of the Diocese of St. Petersburg who will assist the Office of Catholic Schools and Centers and Archives in determining how best to preserve and transfer them for permanent retention.

## **Guidelines for the Transfer of other Closed School Records**

The school staff is encouraged to be inclusive rather than exclusive in the transfer process of school records. In addition to student and personnel records, the administrative, financial, organizational and historical records provide complete documentation of school life. Correspondence, minutes of meetings, reports, financial records, photographs, property records and all the other types of material listed in the accompanying outline ensure that the history of the school can be reconstructed.

## **Once Records Arrive at the Diocesan Archives**

When the records are transferred to the Diocesan Archives, they are registered as having been acquired by the Archives. They are later appraised for historical, legal, fiscal and administrative value. Records are then arranged and described. All records are evaluated for long-term preservation.

The Archives has an access policy that ensures that confidential and sensitive material does not become open for research until such time as confidentiality and sensitivity is no longer an issue. In some cases, records will remain confidential and will be available only to those with a need or right to view them. Policies and procedures for access and use are based on the *Code of Canon Law* and civil law which in turn mandates the application of sound professional principles.

## **Records Management**

Not all records have permanent value. The Archives will determine the ultimate disposition of records in accord with canon and civil laws. Many of the record types specified in the outline are of permanent value. Others will be disposed of according to retention schedules, i.e. financial records. These procedures are applied uniformly and no records of permanent value will be destroyed.

### **School Records Checklist – Permanent Records Included**

Following consultation by representatives of both the Office of Catholic Schools and Centers and Archives, records determined to be permanent will be transferred to Archives:

1. Student Records:
  - a. All student records are arranged in alphabetical order, boxed and transferred to the Office of Catholic Schools and Centers. For high school students, the file should include the official transcript. For elementary school students, the file should include the cumulative card.
2. Personnel Records
  - a. All personnel records (which include application, transcripts, teaching certificates, forms required by the diocese, federal, state, and local government, records of termination, and current profession contracts) will be alphabetized, boxed and transferred to the Office of Catholic Schools and Centers. These files will be maintained in accordance with Diocesan policies.
3. Handbooks:
  - a. These include the current student/parent handbook and the current faculty and staff handbook.
4. Injury and/or Accident Reports:
  - a. Written documentation of incident and accident reports kept on file at the school will be transferred to the Office of Catholic Schools and Centers and maintained in accordance with civil laws.
5. Legal Documents:
  - a. These consist of Articles of Incorporation; deeds to school property; contracts or leases; tax reports and documents from any court cases in which the school or its organization may have been involved.
  - b. Establishment of schools, school boundaries, etc.
  - c. Appointments of principals and school pastors
  - d. Documentation relating to the closing of the school
6. Historical Events:
  - a. Jubilee/dedication booklets; all articles related to the school, school history, etc.

7. School Administration:
  - a. Correspondence with Bishop and/or Chancery Officials; correspondence with the Office of Catholic Schools and Centers, general correspondence regarding school administration.
8. School Organizations (list the name of the organization with the following)
  - a. Organization's articles of incorporation, constitution and bylaws with dates
  - b. Minutes of meetings (include dates); names of officers and members
  - c. Financial reports, correspondence, publications, special activities
9. Photographs (identify with dates and place or activity)
  - a. Inside and outside photos of school building (pencil on back e.g. 1<sup>st</sup> school 1865-1870)
10. Building Information and Property Records
  - a. Any other building information not already included in the above reports.
  - b. Architectural drawings and blueprints
  - c. Construction Contracts
11. Financial Records
  - a. Account books and ledgers; annual financial year end statements, trust and estate correspondence, collection reports; summary reports (indicate range of dates in all categories)
12. Miscellaneous
  - a. Yearbooks, digital media, student newspapers, trophies/awards, historical decorations (i.e. quilts or other materials that were used to permanently decorate the school.)

**APPENDIX A: RECORDS RETENTION SCHEDULE FOR PARISHES AND SCHOOLS**  
**(Not all records of a parish or school may be listed in this schedule)**

**CODES:**

**ACT – ACTIVE; AR – Annual Review; CY- Current Year; FY – Fiscal Year; P – Permanent; SUP – Superseded; VR- Vital Record**

<b>Series/Title Description</b>	<b>Retention</b>	<b>Notes</b>
<b>ADMINISTRATIVE RECORDS</b>		
Annual Reports (Parish & School)	P	VR
Appointments, canonical	P	
Articles of Incorporation	P	VR
Census Records (may include parish list)	P	
Correspondence, routine	AR	
Correspondence, non-routine (i.e. with Bishop and/or Pastoral Center officials)	P	
History File-Jubilee/dedication booklets; articles on parish & school, parish & school history; yearbooks	P	
<b>PERSONAL PAPERS</b>		
Papers from pastors, parochial vicars, et al. May include correspondence, homilies, notes, and diaries	P	
<b>BOARDS, COMMISSIONS, COMMITTEE RECORDS</b>		
Constitution and Bylaws (for all parish organizations)	P	
Finance Council Minutes/Agendas	P	
Pastoral Council Minutes/Agendas	P	
Altar Guild Minutes/Agendas	P	
Other Committee Minutes/Agendas	P	
<b>FINANCIAL RECORDS</b>		
Audit Reports	P	VR
Accounts payable invoices – Vendors	FY+6	
Accounts payable invoices – Construction Projects	P	
Accounts payable invoices – HUD Projects	P	
Bank Deposit slips and Support Documentation – Endowed	P	

Bank Deposit Slips and Support Doc – Unrestricted	FY+6	
Bank Statements/Reconciliations/Canceled checks	FY+6	
Capital Asset Ledger and Invoices	P	
Copyrights/Trademarks	P	
Financial Statements-Parish-Annual	P	
Financial Statements – School-Annual	P	
General Ledger – detailed transactions	P	VR (historical)
Cash Receipts Journal	P	
Cash Disbursement Journal	P	
Check Register	FY+6	
Insurance Policies	P	
Insurance Policies – Canceled	P	
Investment Reports	FY+6	
Pension Records	P	
Trust/Estates	P	
Payroll	P	
<b>PROPERTY RECORDS</b>		
Appraisals	SUP	
Architectural Drawings and Specifications	P	
Construction Files	P	
Deeds	P	
Project files for each project	P	
Environmental tests and projects	P	
Hazardous materials incident report	P	
Project close-out documents	P	
Surveys, Drawings, Shop Drawings, Blue Prints	P	
<b>PERSONNEL RECORDS</b>		
Accident/Injury reports	FY+6	
Applications/Resumes	FY+2	
Criminal background checks	P	
Disability records (group disability and Ins. policy records)	P	
Discrimination Claims	P	
Pension vesting files and reports	P	
Years of service records	P	
Termination records/separation form	P	
Toxic substance exposure reports	P	
Form 990	P	

Short term & Long term disability claims	P	
Pharmacy Exception files	P	
Voluntary Life Death Claims	P	
<b>SACRAMENTAL REGISTERS</b>		
Sacramental Registers, supporting documentation (includes index)	P	VR
Mass Intentions (after Masses have been satisfied)	FY+1	
Sick Register	FY+1	
Back up for Baptismal, Confirmation, etc. if all recorded properly	FY+1	
Marriage Preparation files	60 years or until both parties are deceased.	
<b>MEMORABILIA</b>		
Pamphlets	P	
Programs	P	
Scrapbooks	P	
Newspaper clippings (copied-then destroy newspaper. Newspapers contain lignin, which deteriorates)	P	
<b>PHOTOGRAPHS</b>		
Activities (dates, descriptions)	P	
Complex/Building (inside & out with dates)	P	
Personnel (with identification & dates)	P	
<b>PUBLICATIONS</b>		
Bulletins	P	
Directory	P	
Historical publications and parish bulletins	P	
<b>SCHOOL RECORDS</b>		
Student Records, student health care card & immunizations, transcripts/grades, standardized test scores.	P	
Personnel Records	P	
School Organizations (Name, articles of Inc., constitution, bylaws with dates. Minutes of meetings, Rosters with names of officers and members.	P	

Annual Reports	P	Administrative, Historical
Architectural Drawings & Specifications	P	Administrative, Historical
Construction Files (contracts, correspondence)	P	Administrative, Historical
History File (historical sketches, photographs, newspaper clippings, letters)	P	If not available, administrators should create and maintain a school history file.
Memoranda & Directives from the Diocesan School Superintendent of Schools	P	Administrative
Parent's Newsletters	P	Historical
Parent-Teacher Bulletins	P	Administrative, Historical
School Board Files (minutes, resolutions, correspondence, memoranda, regulations)	P	Administrative
Scrapbooks (newspaper clippings, letters, programs, photographs, etc.)	P	Historical
Student Organization Records (minutes, report, by-laws, photos, etc.)	P	Historical
Student Publications (yearbooks, histories, newsletters, etc.)	P	Historical
Payroll Journal	P	Administrative
Audit Reports	P	Fiscal, Historical
Student and faculty handbooks	P	

<b>HISTORICAL RECORDS</b>		
Pastor appointment letters	P	
Diocese decrees and correspondence concerning parish boundaries	P	
Status Animarum reports	P	
Picture file of historic events including ground-breakings, parish anniversaries, Bishop visits, school gatherings, etc. (People in pictures and events should be identified/dated)	P	
Donation records – a summary list should be maintained if the funds involve donations for altar, stained glass windows, building renovation, pew dedication and similar items-this avoids later controversy.	P	



## **RETENTION SCHEDULES: Accounting and Finance**

Information from the DOSP Accounting & Finance Department: *Financial Guidelines and Policies Manual for Parishes, Schools and Early Childhood Centers.*

### **XXIV. Records, Maintenance, Retention and Disposal Effective Date: 7/1/99**

#### **STATEMENT OF POLICY**

“Financial records” consist of various original documents, reports and journals that serve as a written, historical record of the financial activities of the parish or school. All such records must be maintained in a secure manner at the designated business offices, or, in the case of prior years’ records, in a designated outside storage location that is safe and secure. All such financial records should be available for reference and examination by authorized persons upon reasonable notice. In addition, a “records retention” policy and system should be in accordance with approved Diocesan guidelines.

#### **PROVISIONS**

1. The following financial records should be retained seven years and then destroyed:
  - Bank deposit slips, bank statements and reconciliations, canceled checks and stubs, disbursement and receipts, registers/computer edit listings, correspondence concerning payments and receipts, paid invoices, purchase orders
2. The following financial records should be retained for seven years and then destroyed:
  - Contribution records (offertory, donations, gifts, etc.) W-2s, W-3s, 1099s.
3. The following financial records should be retained permanently for fiscal and historical value:
  - Audit reports, financial statements, general ledgers, tax exemption certificates and correspondence, trust/estate files, construction files (contracts, drawings, specifications), real estate files/records, equipment files (warranties, manuals), property appraisals, property inventories, payroll records and personnel files, cemetery and burial records.

**APPENDIX B: A BASIC GUIDE TO ARCHIVAL PRESERVATION  
(for the no-budget archives)**

**Environment**

**Temperature and humidity**

Most parish and school archives don't have temperature and humidity gauges, nor do they have a high-tech HVAC system like well-funded archival facilities do. Keeping temperatures and humidity around 70 degrees or cooler with a humidity level of approximately 40% is close to ideal. Fluctuation in temperature and humidity causes the most damage to items. The humidity and heat cause the molecules to expand, and the dry, cool temperatures cause them to contract. This is what causes paper and photographs to warp.

**Light**

Keep original items out of the light. Light accelerates deterioration of archival materials. It leads to weakening and embrittlement of cellulose fibers and can cause paper to bleach, yellow, or darken. It also causes media and dyes to fade or change color, altering the legibility and/or appearance of documents, photographs, art works and bindings. Ideally, materials should be exposed to light only while in use. Permanent exhibition of materials should be avoided. Materials should never be displayed where the sun shines directly on them.

**Storage**

Archives use acid-free boxes and folders, which can be expensive. If your budget does not allow for archival quality storage materials, you can start with regular 10" x 12"x 15" boxes. Try to avoid plastic containers as these do not allow materials to "breathe" and can harbor harmful humidity, mold or create a microclimate. As your budget permits, you can incrementally progress to better storage containers.

**Placement**

Keep collections off the ground, preferably by at least one foot to help prevent flood waters from reaching materials. Choose a place that is insect and vermin free.

**Supplies**

<b>DO</b>	<b>AVOID</b>
Use plastic clips	<b>Paperclips</b> and <b>staples</b> can rust, causing damage to the materials they come into contact with.
Use plastic clips, regular unbleached cotton string or just keep materials together in a folder	<b>Rubber bands</b> and tape are acidic and can leave crusty residue.
Use plastic clips or keep materials together in a single folder.	<b>Tape</b> is irremovable and will stain paper.
Always use pencils when working around archival materials.	<b>Pen ink</b> is irremovable and can be accidentally transferred from one's hand to materials.
Fold bond paper around the item, or interleave items with bond paper. Mylar (inert plastic) sleeves are best, but expensive.	<b>Plastic sleeves</b> can leach chemicals and cause wrinkling long-term

## **Basic Care and Preservation of Collection Materials**

### **Paper**

Unfold papers so they can stand or lie flat. Papers can be organized into folders. Avoid allowing folders to slump, as this will cause the papers to curl.

### **Newspaper Clippings**

Newspapers are made of highly acidic ingredients and will leach acid onto surrounding documents, causing a brown stain to appear on them. The best practice is photocopying them as this will last far longer than the newspaper itself. Once copied dispose of the clippings. If you really want to keep the original, place it in a plastic or mylar sleeve.

### **Photographs**

The archenemy of photographs is light. Handle photographs by the edges or wear white cotton gloves to minimize the transfer of oils from your fingers to the emulsion, which can cause long-term deterioration. Organize them into folders. Store negatives in folded bond paper to keep them together.

Picture frames are generally poor for preservation because the cardboard backings are acidic and the frame taking up far too much space.

Photo albums are convenient but can pose preservation problems. Photos should not be face-to-face as the emulsion surfaces can stick to each other. Sticky albums are acidic. Plastic pockets are not chemically inert and will leach chemicals onto the photographs. It is best to remove photographs from albums as long as it does not damage the photo. If they are glued in, leave them. If there is a special layout you can take pictures of each page so future researchers can see how it was arranged.

### **Audio-Visual Materials**

Audio-Visual (A/V) formats run the gamut. Like photographs, A/V materials suffer from prolonged exposure to light as well as fluctuations in temperature and humidity. Be careful about playback of the materials, as the equipment can eat the media, irreversibly damaging it. A/V materials are in imminent danger of deteriorating beyond recovery soon, regardless of where they are stored. Experts expect magnetic cassettes (audio or video) to only last 7-10 more years. Consider immediately reformatting them to a digital format. When digitizing you should always keep the digital file in more than one location, for example on your computer hard drive and in the cloud. It is easy for data to become corrupt or erased.

If you find a film, audio reel or microfilm that has the scent of vinegar, isolate these from other materials and consider immediate reformatting. "Vinegar syndrome" is a sign the media is deteriorating quickly and in danger of being irrecoverable.

### **Scrapbooks**

Scrapbooks are unique and personal, but since they include so many types of materials, they are difficult to preserve and keep stable. If the binding can be safely undone without compromising the book, you can unbind it and interleave the pages with bond paper. If it is

tightly bound, stuffing the book with bond paper would only put stress on the binding and cause it to crack. If items are falling out or no longer remain glued, take photographs of the scrapbook to retain its original layout, then remove loose items and put in separate folders or envelopes to be kept with the scrapbook.

### **Suppliers & Resources**

Archival suppliers include:

- Hollinger Metal Edge, [www.hollingermetaledge.com](http://www.hollingermetaledge.com)
- Gaylord, [www.gaylord.com](http://www.gaylord.com)

### **Basic Preservation Resources**

- National Archives: <http://www.archives.gov/preservation/family-archives>
- Library of Congress: <http://www.loc.gov/preservation/family/>
- Northeast Document Conservation Center:
- <https://www.nedcc.org/free-resources/preservation-leaflets/overview>

### **Basic Archives Books**

- Hunter, Gregory S. *Developing and Maintaining Practical Archives*. New York: Neal-Schuman Publishers, Inc., 1992.
- Yakel, Elizabeth. *Starting an Archives*. Lanham, MD: The Scarecrow Press, Inc., 1994.
- Zamon, Christina. *The Lone Arranger: Succeeding in a Small Repository*. Chicago: Society of American Archivists, 2012.

## **APPENDIX C: RECORDS TO SAVE FOREVER**

**Archival records tell the story of the Diocese and its parishes, missions, and schools.**

**Only 3-5% of all records created are archival and should be saved forever.**

**Avoid using sticky notes, staples, metal paper clips, tape of any kind, rubber bands and ballpoint pens on archival records. A hole punch should not be used on archival records.**

**Organizational Records** — *Required by Canon Law.*

Boards, Councils, Committees & Commissions charters, constitutions and by-laws;  
Minutes of meetings and rosters of members; List of Charter Members of the Parish; Policies and procedures.

**Sacramental Records** – Keep in fireproof cabinets.

**Executive Correspondence (ex officio)** — *Only that which is unique to the office/parish.*

Letters, diaries, memoranda, speeches, homilies, curia files and relevant subject files.

**Financial Records** — Audited financial statements, annual reports and balance sheets; Loans, securities, insurance, property and investments.

**Legal Records**— Articles of Incorporation, deeds, copyrights, adoptions, cemetery records, annulments and those sacramental registers required by Canon Law.

Accreditations, certifications, contracts, licenses and permits.

**Annual Reports** — Studies, statistics, reports, reviews, and planning documents. Reports of parish and parish organizations.

**Personnel Records** — Disability, retirement, and employee permanent files;

Seminarian, priest and deacon files; Years of service records;

Safe Environment records; Social Services client forms and child welfare files.

**Property and Construction/Building Records** — Plat maps and ground surveys.

Original architectural drawings (pencil, ink or CAD).

Blueprints (*which are copies of originals*), and blue line or black line copies.

Specifications (*specs*); Closing documents and Sold Property records.

Easements, permits, deeds, titles, and equipment (*asset file*).

**Wills and Bequests** (especially if funds were designated for a particular project).

Equipment (asset file).

**Communications**— Weekly, monthly or quarterly newsletters and notices.

Press releases and advertising. Parish bulletins.

**Printed Materials** — Directories, histories, and pictorial books.  
Anniversary programs, announcements, booklets, and invitations.  
Flyers, brochures and posters of annual events, workshops, seminars.  
Policies and procedures manuals; training manuals; press kits.  
Newspaper clippings with dates (*photocopy if on acidic/brittle paper, then toss originals*).

**Photographs** — Staff, events and buildings (*keep only best representative samples*).  
Identify by year, place, occasion and people (*use pencil on back*)

**Other Formats** — Digital records (*spreadsheets, images, databases, podcasts*).  
Original drawings, designs, paintings, prints, artifacts and sacred furnishings.  
Audio tape recordings, videos and films of speeches, interviews and events.

**School Records**  
Student and faculty handbooks; special events programs and pictures.  
Student records, transcripts, and rolls.  
Staff employment records and date of service lists. ([See Appendix A](#))

**Cemetery Records**  
Plot maps and owner information.  
Internment records and financial reports.

## **CLOSED SCHOOL RECORDS TO DESTROY**

### **Guidance/Discipline/Health Records**

The following records are to be returned to the parent. If the parent is unable or unwilling to take possession of these items, **these records are to be destroyed.**

- Abuse/Neglect Records
- Discipline Records
- ESE Records
- Student Support Plans
- Vaccination Records
- Allergy information
- Medication information
- Other health-related information

## **APPENDIX D: GUIDELINES FOR WEEDING RECORDS**

When preparing records for the Archives, discard the categories of materials listed below. The result is significant savings in storage space and costs, and faster and more efficient retrieval of information for business and future research purposes. Extensive weeding is necessary when record groups contain large numbers of information copies or duplicate copies of documents.

**The following records should not be transferred to storage or the Archives:**

**Drafts:** Upon final signature of a contract, agreement, letter, policy, etc., all prior drafts and notes, whether handwritten, hard copy or electronic, should be destroyed.

**Routine Correspondence** (housekeeping-type records): Included in this category are letters of transmittal or cover letters that merely forward an enclosure and add nothing to the content of the item transmitted, meeting announcements, address changes, envelopes, invitations, calendars, phone logs and requests for general information.

**Memoranda:** Only those memoranda sent by your department (i.e. the originating office) should be transferred to storage. Discard those concerning routine matters, such as holidays, vacation schedules, etc. Retain those concerning policies, procedures and collections of funds. Correspondence and memoranda sent outside the company relating to matters that are contentious or are likely to be contentious in the future should also be retained.

**Inactive Routine Department Budget Files:** Detailed and summary financial records are normally retained by the Finance Department.

## APPENDIX E: GUIDELINES FOR PACKING RECORDS

The following specifications should be followed in preparing boxes for transfer to storage of inactive or semi-active records and for permanent placement in the Archives:

Only pack records that are original to your department. Discard or return records from other departments or organizations. Records must have long-term operational, administrative, fiscal, legal or historical value to warrant placing in storage or in the Archives.

- Review records for items that may be discarded based upon the Guidelines for Weeding. Remove clips, metal staples, clamps, post-a-notes, rubber bands, etc. Any duplicates, drafts, reference material, unofficial notes, routing slips, and other non-record material should be removed and destroyed.
- Use only standard 10"x 12"x 15" sized acid-free boxes if possible. These boxes can be found at Archival supply stores such as [Gaylord Archival](#) and [Hollinger Metal Edge](#). Copy paper boxes, long banker boxes, and odd cardboard boxes are unacceptable.
- Transfer records from hanging folders (Pendaflex) and binders to manila folders and retain folder titles, which can be penciled on the tabs. Hanging folders and binders are not records and take up too much space.
- Keep files in their original order as arranged in the file drawers or binders. Do not mix records, i.e. putting financial records in the same box as construction files. Pack files standing up vertically in boxes if possible. Records in file cabinets that are not arranged in a logical order for easy retrieval should be put in order before packing boxes. Boxes should be labeled with a Major Subject (Finance), Sub-topic (Finance Council minutes of meetings), Date range (2016-2019), Permanent (or the date of destruction, i.e. Paid Invoices-FY+6 year retention).
- Do not overload cartons beyond original size. Partially filled boxes are unacceptable. Keep such boxes in the department or agency until enough similar material has accumulated to fill the entire box.
- Pack only one group of records in each box, i.e. student records together in one box, personnel records together in another box. Do not mix records.
- List the contents of each box on a folder-by-folder basis. Put inside the box on top of the records under the lid. Do not tape lists to boxes or lids.



- Fill out the label on the outside of the box with the entities name, title of record, and date or date span of the records. Example:

SACRED HEART ACADEMY, TAMPA
STUDENT RECORDS A – G
1948 – 2015
DESTROY DATE / PERMANENT

- Do not tape lids to boxes.
- Do not transfer vital, archival records or fragile materials to an off-site storage facility. Instead, please call the Archives Office to discuss how such records and materials will be stored.

## **APPENDIX F: PATRIMONIAL GOODS**

Canon 1171 – Sacred objects, which are designated for divine worship by dedication or blessing, are to be treated reverently and are not to be employed for profane or inappropriate use even if they are owned by private persons.

Official Documents of the Holy See – Prior to alienation, all sacred objects, relics, sacred furnishings, stained-glass windows, bells, confessionals, altars, etc. are to be removed for use in other sacred edifices or to be stored in ecclesiastical custody. Because altars can never be turned over to profane use, if they cannot be removed, they must be destroyed (cf. cann. 1212 and 1238) (*Letter from the Congregation for the Clergy and procedural Guidelines for the Modification of Parishes and the Closure, Relegation and Alienation of Churches – The Jurist 73, 2013, 211- 219.*)

Canon 123 – In the case where the portion of the Christian Faithful is reallocated among pre-existing or newly created parishes, the corresponding patrimony and obligations of the closed parishes must follow the Faithful in an equitable and proportionate fashion in accord with the corresponding responsibilities and pastoral duties assumed by the parishes *ad quem* [the receiving parishes]. The wishes of any existing founders and benefactors must be respected, as must any acquired rights as expressed in canon 121 or 122.

Canon 1283 - Inventory of Goods - Before administrators begin their function:

1/ they must take an oath.....

2/ They are to prepare and sign an accurate and clear inventory of immovable property, movable objects, whether precious or of some cultural value, or other goods, with their description and appraisal; any inventory already done is to be reviewed;

3/ one copy of this inventory is to be preserved in the archive of the administration and another in the archive of the curia; any change which the patrimony happens to undergo is to be noted in each copy.

Canon 1190 – Relics

§1. It is absolutely forbidden to sell sacred relics.

§2. Relics of great significance by the people cannot be alienated validly in any manner or transferred permanently without the permission of the Apostolic See.

§3 The prescript of §2 is valid also for images which are honored in some church with great reverence by the people.

## **APPENDIX G: A PRAYER FOR ARCHIVISTS**

### **A PRAYER FOR ARCHIVISTS**

by Lisa G. Mobley

Associate Director of Archives and Records

#### **O God, master of all knowledge,**

Be so kind as to shed Your blessing on the stewards within this diocese who will assist in the establishment of parish and school archives.

Grant that these archives may be preserved  
from flooding, hurricanes and other dangers;  
That they may in time grow to suitable sizes;  
and that all who gather to work, study or research their records  
one day may grow in the knowledge of divine and human affairs  
and may at the same time make progress in the love of You,

Through Christ our Lord.

**Amen.**

Please know that we are grateful to all in our parishes, missions and schools. We are here to serve and assist you in any way we can. Should you have any questions or concerns regarding this publication please do not hesitate contacting either Deacon Rick Wells, Chancellor ([rwells@dosp.org](mailto:rwells@dosp.org)) (727) 341-6832 or Lisa G. Mobley, Assoc. Dir. of Archives and Records ([lbg@dosp.org](mailto:lbg@dosp.org)), (727) 344-1611, ext. 5383.

*“For we are God’s co-workers; you are God’s field, God’s building.”  
1 Corinthians 3:9*

**THANK YOU AND MAY GOD BLESS YOU IN YOUR MINISTRY!**