

12.12 PROCEDURES OF RECORDS MANAGEMENT:

The goal and purpose of records management in any organization is that of separating and retaining material for the archives, as well as avoiding indiscriminate and irresponsible disposal of important information.

Within the *Roman Catholic Diocese of Victoria Archives*, record retention is governed by Canon and Statutory Law, and guided as follows:

- Duplicate records of baptism, confirmation, profession of faith, marriage and death registers (sacramental records) are forwarded annually to the diocesan office by the parishes. These must be an exact replica of the parish sacramental records. All original records must be forwarded to the diocesan office when the church is closed.
- Original sacramental records more than 75 years old require special measures for preservation. The *Roman Catholic Diocese of Victoria Archives* may request to hold these original registers in a controlled environment, and copies will be retained in the parish. An acceptable protocol agreement will be signed by parties with proprietary interest in these records.
- When a bishop or priest dies, textual and non-textual materials, as well as artifacts and memorabilia are to be forwarded to the *Roman Catholic Diocese of Victoria Archives* for processing, unless prior arrangements have been made. For those materials offered to the *Roman Catholic Diocese of Victoria Archives*, the diocese exerts control over the materials, pursuant to diocesan policy.
- When a parish or church merger takes place, the *Roman Catholic Diocese of Victoria* becomes the manager of all textual and non-textual records, artifacts and memorabilia as of the merger date. Chancery staff will assist the parish in determining which historical records are to be placed in the *Roman Catholic Diocese of Victoria Archives*.
- When a church or rectory is closed, all textual and non-textual materials, as well as artifacts and memorabilia are to be forwarded to the *Roman Catholic Diocese of Victoria Archives* for processing. All materials forwarded to the *Roman Catholic Diocese of Victoria Archives*, are subject to this policy in that the diocese exerts control over the materials, and exercises ultimate authority over all material.

Parishes of the diocese and departments in the Chancery are to forward material for retention in the *Roman Catholic Diocese of Victoria Archives*. Material normally accepted will have at least one of the following attributes:

- It documents the origin, history, spirit and growth of the diocese, its people, parishes, missions, institutions etc.;
- It documents significant activities and events within the diocese; and,
- It has legal, financial or administrative importance in the diocese.

All operational records and materials of the Chancery are resources from which collections are drawn for the *Roman Catholic Diocese of Victoria Archives*. The following types of materials are a priority:

- Minutes and proceedings of meetings;
- Policy manuals, administrative circulars, directories, newsletters/newspapers, publications, pamphlets, brochures, written speeches and homilies, and promotional materials;
- Financial statements;
- Maps and property descriptions;
- Audio-visual materials including recorded documentaries, educational materials, and broadcast material;
- Web caches of original diocesan publications;
- Photographs, art, and sculpture
- Diocesan, parish and clergy histories, anniversaries, celebrations and events;
- Events concerning diocesan personnel or members, organizations or institutions, including special honours conferred, and awards received; and,
- Records of estates, bequests and trusts.

Textual and non-textual records are considered to have a ‘life cycle’. A ‘records retention schedule’ is agreed upon within the Chancery as follows:

- **Creation and receipt:** This marks the date of the record’s initial entry into the organization, either the date it was created or the date it was received. For archives staff, this date satisfies the requirement of arrangement in ‘original order’.
- **Distribution and use:** Once a record is created or received, it is sent to individuals who use it to do their job in the Chancery.
- **Storage and maintenance:** A record is maintained on-site for as long as the information in it is needed for staff to perform organization functions..
- **Retention and retrieval:** Once the regular use of information has stopped, and if there are no legal or other implications in force, records can be moved into a records centre where they can be retrieved as necessary. Some material may be eligible for disposition at this time.
- **Disposition:** At this point, the records are no longer needed for the original purpose for which they were created. Most records are destroyed, except for those which satisfy the acquisition policy of the *Roman Catholic Diocese of Victoria Archives*, or are retained as required by Canon Law and Statutory Law.

Generally, each department in the Chancery determines for what period of time a record will be retained, in line with diocesan or department guidelines. The archives staff must be consulted before final disposition of any material is carried out.