

Managing Records in the One Parish Transition Process

1. Why Records Management Matters During Parish Transitions

When parishes come together to form one canonical parish, they will also bring together decades of records from each originating church. Many of these records are still needed for pastoral care, legal compliance, financial management, and historical continuity. Without proper attention now, important information can easily be lost or become impossible to find when you need it.

The good news is you don't need to become a records management expert. This process is designed to be manageable, with clear phases and practical tools to help you move forward one step at a time.

2. What this Process Covers

These guidelines apply to PHYSICAL RECORDS only. For electronic records guidance, please refer to the [*"Data and Technology Sharing" section of the Partners in the Gospel Handbook for Parishes.*](#)

3. What this Process will Achieve

The One Parish records management process has four clear goals:

- **Get rid of unneeded records** according to archdiocesan retention policies
- **Keep only what matters:** active, legally required, or historically significant records
- **Label everything clearly** by originating parish and record type
- **Store records securely** with locations tracked for easy access

Every parish will work on their own timeline. The key is making steady progress, not perfection.

4. Planning for Success

Who Can Help?

- **Parish Staff:** Know the records and buildings best
- **Volunteers:** Can handle time-consuming sorting and labeling tasks
- **Archives Team:** Available for complex cases and questions

Matching People to Tasks

- **Making retention decisions:** Trusted, experienced staff
- **Sorting/Labeling:** Organized volunteers

- **Inventorying:** Detail-oriented staff or volunteers
- **Data entry:** Tech-comfortable helpers
- **Determining storage locations:** Office and facilities staff

Keep It Simple, Keep It Moving

You don't need to do everything perfectly, just take it one step at a time. Even small progress makes a big difference in getting organized and making the transition smoother for everyone. Remember: the Archives team is here to support you with guidance and answers to your questions.

5. Getting Started

Ready to begin? We've created a tipsheet for each phase with step-by-step guidance:

- [Tipsheet 1: Records Cleanup](#)
- [Tipsheet 2: Organizing and Labeling](#)
- [Tipsheet 3: Storage](#)
- [Tipsheet 4: Inventory](#)

6. Need help or have questions? Email us!

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