RECORDS MANAGEMENT TRAINING

PAA DAYS Spring 2018
Who we are...

Seth Dalby
Director of Archives & RM
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206-382-4352

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Archivist/Records Manager
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Learning Objectives

At the end of this training, you should...

• be able to identify a “diocesan record”
• understand why good stewardship of our records is so important
• be aware of your records management responsibilities
• know what the Records Retention Schedule is and how to use it
Part One:
What is a Diocesan Record?
Any documents, regardless of format or storage location, that are made or received in the course of diocesan work and saved for information, evidence, or further action.
Record *Format* Examples:

- Paper
- Photographic Prints and Negatives
- Email
- Word Processing Documents
- Spreadsheets
- Databases
- Audio/Video recordings
- Blogs
- Text Messages
- Digital Images (photographs and scans)
“...regardless of storage location.”

- File cabinets
- Records boxes
- Local hard drives
- Network servers
- “Cloud” servers
- Mobile phones
Value of Records to the Archdiocese

ESSENTIAL TOOLS OF ADMINISTRATION & ACCOUNTIBILITY

• Contain info needed for daily operations and “business continuity”
• Support policy setting and decision making
• Provide evidence of activities & decisions (audits & lawsuits)
• Help fulfill financial & legal obligations
• Historic record of the life of the Church
Part Two: Your SIX Records Management Responsibilities

1. “Adequate & Proper Documentation”
2. Oversee sacramental recordkeeping
3. File records according to a consistent system
4. Secure sensitive information
5. Retain & dispose of records according to policies
6. Train staff
Responsibility #1: “Adequate & Proper Documentation”
Adequate & Proper Documentation

• Records management practice of ensuring the creation and maintenance of complete and accurate records about an organization as evidence of how it operates.

• Based on Federal statutory requirements for government agencies. (36 CFR.1222.22)

• Adapted as best practice benchmark by private sector to ensure administrative, legal, audit & financial requirements are met.
Adequate & Proper Documentation

RECORDS DESCRIBING

• Parish structure
• Important functions performed
• How functions are carried out
• Financial accountability
• Policies & their background
• Major deliberations & decisions and their background
Adequate & Proper Documentation

Records made at/near the time of event/activity they relate to by person with direct knowledge and competence to create them.

• Required by evidence law for admissibility of business records (Federal Rules of Evidence Rule 803, RCW 5.45.020)
Adequate & Proper Documentation

B. Records are COMPLETE

- Clear identification of:
  
  • Author of record
  • Intended recipient or audience of record if applicable
  • Dates of creation/amendment
  • Matter or activity the record pertains to

- Required signatures & seals are present
Responsibility #2: Sacramental Records
Responsibility #2: Sacramental Records

"Each parish is to have parochial registers; that is, those of baptism, marriages, deaths, and others as prescribed by the Conference of Bishops or the diocesan bishop.

The pastor is to see to it that these registers are accurately inscribed and carefully preserved."*

*Can. 535 - §1.
Responsibility #2: Sacramental Records

Implementing sacramental records oversight in practical terms

• Documented workflows with roles & responsibilities
• Informal check ups to ensure compliance
• Sacramental responsibilities & delegations included in job descriptions
• Included in annual performance evaluations
• Required training
Responsibility #3: File Records According to a Consistent System
Responsibility #3: File Records According to a System

Have a unified filing system that incorporates:

- All formats of records (paper, electronic)
- All storage locations (cabinets, boxes, online)
- All staff
- Based on parish functions and activities (see Records Retention Schedule)
- Ask Archives for advice in setting this up.
Responsibility #4: Secure Sensitive Information
What is Sensitive Information?

Data that needs to be protected from unauthorized access to preserve the privacy or security of an individual or organization.
Main Types of Sensitive Information

1. Personally Identifiable Information
2. Protected Health Information
3. Student Educational Records
4. Private Business Information
Personal Information

PII - “Personally identifiable information” that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context.
PII - Specifics

First name/initial and last name in combination with:

(a) Social security number;
(b) Driver's license number or Washington identification card number; or
(c) Account number or credit or debit card number, in combination with any required security code, access code, or password that would permit access to an individual's financial account

(RCW 19.255)
PII Data Breaches

What to do?

Contact Chancellor’s office or Archives/Records Management immediately.

• Mary.Santi@seattlearch.org
• Seth.Dalby@seattlearch.org
Personal Information (2)

Protected Health Information (PHI)

• Info about health status, provision of health care, or payment for health care that is created or collected by a "Covered Entity" and can be linked to a specific individual.

• Governed by federal HIPAA (Heath Insurance Portability and Accountability Act)

• Contact Benefits Services with questions.
Personal Information (3)

Student Educational Records

• FERPA (Family Educational Rights and Privacy Act)
• Federal law to protect the privacy of education records
• Provides guidelines for appropriately using and releasing student education records.
Private Business Information (PBI)

• Non-public information about processes, operations, income, etc. that might harm an organization if made public.
• Must disclose if required by law or internal policy.

(US Code of Federal Regulations, 19.201.6)
PBI - Examples

– Business plans (land acquisition or construction plans)
– Financial information
– HR processes
– Personnel information
Securing Sensitive Information

- Physical Storage
- Onsite Digital Storage
- Cloud Storage
Physical Storage

• Locked file cabinet
• Locked room
• Access privileges defined by role (included in job description)
• Protected Health Information – specific storage requirements (HIPAA): contact Benefits Services or Chancellor’s Office.
Onsite Digital Storage

• Backed up computer hard drive or network server
• Password protected access
• Access privileges based on role (included in Job Description)
Cloud Storage

- Organizational computer data kept on remote server
- Available via Internet
- Google Docs (Google Drive), Dropbox, iCloud, etc.
- Pay models only! Free service not appropriate for sensitive information.
- Don’t put us at risk - Contact Archives/IT for more information!
Responsibility #5: Retain & Dispose of Records according to Policies
Responsibility #5: Retain & Dispose of Records according to Policies

A. Records Retention Policies Exist!
   • On our Website
   • Updated Frequently

B. Demonstrate Compliance
Responsibility #5: Retain & Dispose of Records according to Policies

C. Appropriate, Consistent, & Timely Disposition
   • Apply policies to all records
   • Plan for it
   • Do an Annual Clean-up/Destruction
Responsibility #6: Educate Staff
Responsibility #6: Educate Staff

• Understand records policies AND inform all staff at your parish that records policies exist and show them where to find the Records Retention Schedule and other Diocesan policies.

• Pastor, Staff, and Volunteers **ALL** must know their records management responsibilities.

• Helps to support the already strong recordkeeping culture in the diocese.
Part Three:
Using the Records Retention Schedule
What is a Records Retention Schedule?

• Table that lists & describes all possible records series in parishes
• Mandates the required retention period for each series
• Describes what to do with the records when this period of time has expired.
Benefits to the Parish

• Better utilization of storage areas
• Quick retrieval of information
• Demonstrate legal/regulatory compliance
• Vital information always available
• Safeguard against legal sanctions by avoiding spoliation of evidence.
How is the Schedule organized?

By business and pastoral **function & activities**.

- **Functions** = Main responsibilities by which mission & mandates are fulfilled. Generally made up of several activities.

- **Activities** = Individual tasks or processes by which functions are fulfilled.

- Activities result in records creation.
Parish Functions

1. General Administration
2. Asset Management
3. Sacramental Administration
4. Cemetery Administration
5. Financial Administration
6. Personnel Administration
7. Liturgical Administration
8. Performance & Theatrics
9. Information Management
10. Community Outreach
11. Spiritual Direction
12. Personal Papers
13. Technology Management
14. Training
15. Youth Services
16. Legal
Activities within the Asset Management Function

[See page 20 for parishes]

1. Design & Construction
2. Inventory
3. Maintenance
4. Operations
5. Security
What is a Record Series?

A unit of files or documents organized according to a filing system and kept together because they:

• Relate to a particular subject or function
• Result from the same activity
• Document a specific kind of transaction
• Could take a particular physical form
Activities = Record Creation

Accounting activity

1. Accounts payable/receivable
2. Audit reports
3. Cash receipts
4. General Ledgers
5. Journal Entries
6. Voids/Stop payments
7. Wire transfers
**Terms Found on the Records Retention Schedule**

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Retention</th>
<th>Legal Retention</th>
<th>Disposition</th>
<th>References</th>
</tr>
</thead>
<tbody>
<tr>
<td>500-24</td>
<td>Catholic School Educational Curriculum Guides (K-12)</td>
<td>Permanent (Dissolved or superseded, then arrange for transfer to archives)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>500-25</td>
<td>Curriculum Development Files</td>
<td>Permanent</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>500-26</td>
<td>Attendance Rosters</td>
<td>Calendar year + 3 years or dissolved</td>
<td></td>
<td></td>
<td></td>
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Retention Schedule Terms

- Series Number
- Series Title/Description
- Retention
- Disposition
### 230 Policies, Guidelines, & Procedures
The activity of developing and implementing policies, procedures, directives, guidelines, and process documents.

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The activity of identifying and mitigating risks.

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Dispositions

• **PARISH ARCHIVES**
  – Ongoing Legal, Fiscal, Evidential, or Historical Value

• **SHRED**
  – Sensitive Information (SS #s, Health, or Credit Card #s)

• **RECYCLE**
  – Non-sensitive Information

• **DELETE**
  – Electronic information (Drives, Desktops, and Databases)
Search Strategies

A. By Function
B. Index
C. Control + F keyboard shortcut
Part Four: Exercise
Email
How long do I need to keep it?
Parish Functions

1. General Administration
2. Asset Management
3. Sacramental Administration
4. Cemetery Administration
5. Financial Administration
6. Personnel Administration
7. Liturgical Administration
8. Performance & Theatrics
9. Information Management
10. Community Outreach
11. Spiritual Direction
12. Personal Papers
13. Technology Management
14. Training
15. Youth Services
16. Legal
200 Asset Management

205 Design & Construction

210 Inventory

215 Maintenance

220 Operations

225 Security
205 Design & Construction

The activity of designing, constructing, or remodeling buildings, structures, and infrastructures owned, leased, or otherwise occupied by a parish.

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<td>PS205-05</td>
<td>BLUEPRINTS &amp; ARCHITECTURAL PLANS</td>
<td>Completion of project + 6 years, then contact Chancery Property and Construction</td>
<td>PARISH ARCHIVES</td>
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<td>PS205-10</td>
<td>PROPERTY &amp; CONSTRUCTION PROJECT FILES – Records produced through the processes of planning and design phase, permitting and approval, inspection and quality control, and completion and close out of parish building projects.</td>
<td>Life or sale of facility + 6 years</td>
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May include: preliminary drawings, design criteria, draft construction proposals and plans, final initial as-designed drawings, final as-built drawings, buildings and plans, entitlements, zoning, master and conditional use permits, environmental impact statement, SEPA, discernment, archdiocesan approvals and initial program, codes and other applicable regulations, budgets, cost estimates, bids, proposals, cost data/reports, project schedules, meeting reports, surveys, site/project visit reports and studies, project manual, memoranda, maintenance manuals, warranties and guarantees, certificates of substantial completion and certificate of occupancy, construction deficiencies/corrections, guarantees, bonds, related affidavits or releases, preliminary lien notices, special product warranties, project team list and contact information, geotechnical reports, concrete studies, test reports, steel reports, and masonry reports.
| PS205-10 | PROPERTY & CONSTRUCTION PROJECT FILES — Records produced through the processes of planning and design phase, permitting and approval, inspection and quality control, and completion and close out of parish building projects. | Life or sale of facility + 6 years | PARISH ARCHIVES |

May include: preliminary drawings, design criteria, draft construction proposals and plans, final initial as-designed drawings, final as-built drawings, buildings and plans, entitlements, zoning, master and conditional use permits, environmental impact statement, SEPA, discernment, archdiocesan approvals and initial program, codes and other applicable regulations, budgets, cost estimates, bids, proposals, cost data/reports, project schedules, meeting reports, surveys, site/project visit reports and studies, project manual, memoranda, maintenance manuals, warranties and guarantees, certificates of substantial completion and certificate of occupancy, construction deficiencies/corrections, guarantees, bonds, related affidavits or releases, preliminary lien notices, special product warranties, project team list and contact information, geotechnical reports, concrete studies, test reports, steel reports, and masonry reports.
Part Five: Record Resources
Many Gifts, One Spirit

Section 1: Policies for Pastoral Ministry

✓ Social Media Policies
✓ Records Management
✓ Sacramental Records

www.seattlearchdiocese.org/Archdiocese/Policies/Contents.aspx
Chancery Archives Website

- Resources page
- Policies page
We’re resources too!

- Seth Dalby, Director (206-382-4352) seth.dalby@seattlearch.org

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Part Six: Questions
THANK YOU

Please contact us for your certificate of completion at Archives@SeattleArch.org