

GUIDELINES FOR RETENTION OF CATECHETICAL RECORDS

- Retain records for all current students, participants, volunteers, activities. Past records should be retained according to schedule below.
- Records may be paper or electronic if backed up on a server, disk, or other device.
- When discarding, paper records with personally identifiable information must be shredded; other materials may be recycled.

CATEGORY OF RECORD	TYPE OF RECORD	RETENTION PERIOD	SUGGESTED KEEPER OF RECORDS
Administrative Records			
	Christian Formation Committee Minutes	7 years	Catechetical Office
	Program Policies and Procedures / Handbooks	Until superseded	Catechetical Office
	Newsletters	2 Years	Catechetical Office
	Correspondence, Official (Re: parish policies, diocesan directives)	Permanent	Parish / Catechetical Office
	Correspondence, Routine	Review / discard annually	Author / Catechetical Office
	Reports to archdiocesan offices (safeguarding, program statistical report)	Permanent	Catechetical / Parish Office
	Subject files (memos, schedules, etc)	Review / discard annually	Catechetical Office
	Equipment Inventory, warranties, maintenance	Life of Items	Catechetical / Parish Office
	Parish History (Clippings, photos, publications)	Permanent	Parish / Catechetical Office

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Program Records			
	Calendars, flyers, schedules	Until no longer of administrative value	Catechetical Office
	Lesson Plans, instructional materials, worship aids	Until no longer of administrative value	Catechetical Office
	Class Lists	Until superseded	Catechetical Office
	Attendance Records (class, event)	1 Year	Catechetical Office
	Field Trip, Activity, Sport Permission Forms	5 Years	Catechetical Office
	Volunteer Driver Forms	5 Years	Catechetical Office
Finance Records: Most financial records are maintained by Parish Business Office, according to financial retention schedule			
	Tuition/Fee Records	7 years	Catechetical / Business Office
	Invoices, Receipts	7 Years	Business Office/Bookkeeper
	Contracts (Speakers, facility rentals)	3 years	Catechetical Office
	Accident / Injury Reports	6 Years	Parish / Business Office

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Personnel Records: Most employment records are maintained by the parish office, according to personnel retention schedule			
	Staff Personnel Files	6 Years after retirement, resignation, or termination	DRE (for supervised staff), Parish Office (for DRE/DYM)
	Religious Education Certification records	Permanent or transferred with employee/volunteer to new parish	Director of Religious Education
	Safe Environment (SEE, background check, code of ethical standards)	Permanent	Safe Environment Coordinator
	Volunteer Information & Rosters (catechists, aides, coaches, chaperones, etc)	5 years	Catechetical Office
Student/Participant Records			
	Registration	5 years after withdrawal from program	Catechetical Office
	CYM Sports (rosters, permission, coach forms)	5 years	Catechetical Office
	Sacramental Preparation Records	1 year after recorded in Sacramental Register	Catechetical Office
	Emergency Cards	Until superseded or student ceases enrollment	Catechetical Office
	Individual Student Disciplinary File	1 Year after student ceases enrollment	Catechetical Office
	Individual Student Accommodations Plan	1 Year after student ceases enrollment	Catechetical Office
	Custody Documents	Until student is 18 years of age	Catechetical Office