



## Managing Your Congregation's Records

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Every congregation creates and uses records on a daily basis in order to support the ongoing work of the church. Some of these records are vital and need to be kept, while others may be recycled or shredded in due course. Some are paper files or registers, while others are digital and remain on the computer. Some may contain personal information about people and therefore need to be properly and carefully managed and used. Knowing how to manage all of this information can be difficult, and accuracy is important. Once records are shredded or deleted the information is gone for good.

### What to keep?

One of the most frequently asked questions we receive is what records need to be kept and what can be disposed of. Certain records have definite long-term value to your congregation and should be kept permanently. These are your "archival" records and include Session minutes, congregational meeting minutes, and baptism and marriage registers. Other records help support a business need and should be kept for a period of time but, once that time is over, can be disposed of. Certain routine financial records fall into this category, with seven years being a general standard length of time. Finally, some records should only be kept for as long as you need them, which could be 2 weeks for some and 10 years for others.

### Why is it important?

You never know when or how certain records will be needed over time. Someone may call requesting a copy of their marriage record so they can apply for a spousal pension, or your lawyer may call and request proof of a congregational name change in order to prove ownership when selling property. Finding this information can consume a lot of time and energy. Having an organized set of paper and computer files will be a blessing when you are faced with a situation where a specific document is needed.

### What can be done?

Simply being intentional and proactive about managing your congregation's information is a good first step. Keeping all your congregational records in one secure location will be a great help. Using a retention schedule to ensure that records with long-term value are kept while records with temporary value are disposed of is also important. It will help reduce clutter and improve your ability to find information when needed. Another important step is to identify those files in your care that contain personal information and ensure they are stored in a lockable filing cabinet, or on a password-protected computer. Finally, backing up your files is vital. Use an external hard-drive to back up your computer and keep it in a safe and secure place outside the building or in a place safe from fire and water damage. We also encourage you to have certain archival records copied to preservation microfilm (and digitized if desired) as a form of insurance.

### Sample Retention Schedule

The table on the reverse of this page lists records and the length of time they should be kept. This list is not exhaustive, and congregations will likely have documents beyond what is noted. (The chart is designed for Presbyterian Churches but is based on a helpful table created by the Canadian Council of Christian Charities.)

### Who to call for help?

For advice and guidance on records and information management, please contact the Presbyterian Church Archives at 50 Wynford Drive. We will be happy to answer any questions and assist in any way we can. We can be reached by telephone at 1-800-619-7301 or by email at [karnold@presbyterian.ca](mailto:karnold@presbyterian.ca) (Kim Arnold, Archivist) or [banger@presbyterian.ca](mailto:banger@presbyterian.ca) (Bob Anger, Assistant Archivist). More information is also available on our website at [www.presbyterianarchives.ca](http://www.presbyterianarchives.ca).

# Records Retention Schedule for Congregations

The following chart has been compiled by The Presbyterian Church in Canada Archives as a suggested guideline to help congregations manage their records. If you have questions or would like further information, please don't hesitate to contact us. Email and telephone information can be found on our website at [www.presbyterianarchives.ca](http://www.presbyterianarchives.ca)

Type of Record/File/Register	How Long to Keep?
Session Minutes	Permanent
Baptism, Marriage, Burial Registers	Permanent
Professing Members Roll (Communion Roll/Historic Roll)	Permanent
Annual Reports/Congregational Meeting Minutes	Permanent
Trustee Minutes	Permanent
Board of Managers/Finance Committee Minutes	Permanent
Insurance Policies	Permanent
Deeds and other Property Documents	Permanent
Estate/Bequest Documents	Permanent
Architectural Plans	Permanent
Congregational History books (1 copy)	Permanent
Financial Records: <ul style="list-style-type: none"> <li>• General Ledger (if applicable)</li> <li>• Year-End Financial Statements (if not in an Annual Report)</li> <li>• T-4 Summaries (if applicable)</li> </ul>	Permanent
Financial Records: <ul style="list-style-type: none"> <li>• Bank Reconciliations/Bank Statements/Cancelled Cheques</li> <li>• Invoices/Receipts of Payment</li> <li>• Utilities and other Bills</li> <li>• Tax related documents</li> <li>• Payroll records</li> <li>• Church Offering Envelope Records</li> <li>• Approved Budgets</li> <li>• Monthly Trial Balances</li> </ul>	7 years
Personnel Records: <ul style="list-style-type: none"> <li>• Employment Applications (successful candidates)/Employment Contracts</li> <li>• Covenant of Care/Leading With Care Agreements</li> <li>• Any Leading With Care incident documents</li> <li>• Police Record Check Log</li> <li>• Resignation/Termination documents</li> </ul>	Permanent
Personnel Records: Sick leave, time sheets, attendance sheets, vacation sheets, performance reviews, disciplinary notes or letters etc.	4 years
Contracts/Agreements (service, maintenance etc.)	Keep as needed
Correspondence (General correspondence, Session correspondence, etc.)	Keep as needed
Communion Registers	Keep as needed
Congregational Organizations/Committees (ie. WMS, Fellowship, Outreach, etc.)	Keep as needed
Statistical Information forms	Keep as needed
Names and addresses of members and adherents	Keep as needed
Sunday School/Bible Study resources (curriculum, study guides etc.)	Keep as needed
Special Events files (ie. Church Picnic, Christmas Pageants, etc.)	Keep as needed
Orders of Service - significant services (1 copy of each)	Keep as needed
Newsletters (1 copy of each issue)	Keep as needed