



A Guide for Dissolving Congregations *Transferring Records to the Archives*

 To be best assisted, [contact the Archives](#) prior to beginning this process. 

What happens to records sent to the Archives?

Once received at the Archives, the material is put into acid-free file folders and boxes. Records are stored in a temperature-controlled room to ensure preservation. Details of the records such as content, date range, and geographic location are entered into our database so that they are easily searchable.

Why send records to the Archives?

As stated in the Book of Forms, *“When a congregation is dissolved, the presbytery clerk shall assume responsibility for collection of the records and transfer the appropriate records to the Archives for deposit.”* (App. G-3.3) Aside from preservation, an archive conveniently provides access and information. Whether it is a request received by the National Office or an email from someone doing their family tree, these records and the details they contain are readily available. Materials may also be used in exhibits or presentations celebrating Presbyterian history and culture. However, in order to protect the privacy of communities and individuals, restrictions are in place for certain types of records. For example, Session minutes are closed to the public for the most recent fifty years from the current year.

How to send your records to the Archives?

Records can be sent via mail or dropped off in person. If being sent by mail, it is recommended that they are packaged in a sturdy box. Bubble wrap or packing paper should be used to protect fragile records (e.g., 19th century registers) and fill gaps within the box to prevent the records from moving around. Additionally, please enclose a listing of the contents of the box or email the list ahead of time.

Do you have a website or social media pages?

Give consent to have any webpages or social media feeds archived through this form: www.presbyterian.ca/web-archiving.

What to do with artifacts?

[Contact the Presbyterian Church Heritage Centre](#) (formally National Presbyterian Museum) if there are any artifacts, furnishings, or church items of historical interest.

Note: Congregations that are amalgamating should **not** send their records to the Archives but instead forward them along to the amalgamating congregation.

Note: Before a church is dissolved it is encouraged that photographs of the exterior and interior of the building, as well as, any memorial plaques, honor rolls, special stained-glass windows, etc. be taken. These photos should then be identified, labelled, and sent to the Archives.

Provided is a list of congregational records that have permanent value and should be transferred to the Archives when a congregation is dissolving. Not all the records listed will have been kept by every congregation, while some documents not included in the list may in turn have archival value. Every congregation is different and the types of records they have kept will reflect that uniqueness. It is important that both hardcopy and **digital documents** are considered. Digital files can be transferred to the Archives via a USB or external hard drive.

Types of Records
Session Minutes and Reports
Church Registers – Baptism, Marriage and Burial
Professing Members Roll/Communion Rolls & Registers
Annual Reports
Congregational Meeting Minutes and Reports
Board of Managers/Finance Committee Meeting Minutes and Reports
Trustees Minutes and Reports
Legal Documents - Deeds and other property documents, including cemetery records
Insurance Policies (Liability)
Architectural Plans
Congregational History Books/historical sketches – <i>one copy of each</i>
Permanent Personnel Files <ul style="list-style-type: none"> • Covenant of Care/Leading with Care agreements or incident documents • Police Records Check log • Confidential Record of Reference Checks • Sick leave, time sheets, attendance sheets, vacation sheets, performance reviews, etc. • Suspected Child Abuse Report and Follow-up Report • Authorization and Consent for Minors • Employee & Volunteer expense claims • Employment/Volunteer Application Forms (for successful candidates only)
Permanent Financial Records <ul style="list-style-type: none"> • Year-End Financial Statements • Governing Documents (Letters Patent, Certificate of Incorporation, Bylaws) • Official Receipts for Income Tax Purposes (Perpetual Endowment Gifts) • Official Receipts for Income Tax Purposes (10-year gifts) • T4 Summaries • Estate/Bequest files
Recent Financial Records (Only transfer those that are less than 8 years old; any that are 8 years and older should be <u>shredded</u>) <ul style="list-style-type: none"> • Bank reconciliations, bank statements, cancelled cheques, etc. • T3010 Annual Charity Information Return • Invoices/Receipts of payment • Utilities and other bills • Payroll records (T4s) • Approved Budgets • General Ledgers (Revenue and Expense Ledgers) • Monthly Trial Balances • Record of Employment (ROE's) • Donation Records • Inventory Records (Only transfer those that are less than 4 years old; any that are 4 years and older should be <u>shredded</u>) <ul style="list-style-type: none"> • Official Receipts for Income Tax Purposes • Church Offering Envelope Records
Photographs
Orders of Service (significant services) – <i>one copy of each</i>
Newsletters – <i>one copy of each</i>
Other items of historical significance relating to the congregation such as scrapbooks, news clippings, videos/DVDs, etc. may also have archival value and should ideally be transferred to the Archives as well

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