



## Managing Your Congregation's Records

Every congregation creates and uses records daily 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 this information is important and can sometimes be difficult. Once records are shredded or deleted the information is gone for good.

### What to keep?

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 but can be disposed of once that time is over. Finally, some records should only be kept for as long as you need them, which could be 2 weeks or 10 years. Following a retention schedule is the easiest way to know how long to keep a record for.

### Why is it important?

You never know when or how records will be needed over time, whether it be for genealogy or legal purposes. Finding this information can be time consuming unless your documents are properly organized. Destroying documents that do not have a permanent retention helps to reduce the number of records one would have to search through for information.

### What can be done?

Simply being intentional and proactive about managing your congregation's information is a good first step. This can be done by keeping your records in a secure location, using a retention schedule like the one below, and backing up your digital files using an external hard drive. Additionally, getting your records microfilmed and/or digitized through the Archives is strongly encouraged for those records listed with permanent retention, especially Church Registers and Session Minutes.

## Records Retention Schedule for Congregations

The table below is a suggested guideline that lists the type of 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.

Type of Record/File/Register	How Long to Keep?
Session Minutes and Reports	Permanent
Church Registers – Baptism, Marriage and Burial	Permanent
Professing Members Roll (Communion Rolls & Registers/Historic Roll)	Permanent
Annual Reports	Permanent
Congregational Meeting Minutes and Reports	Permanent
Trustee Minutes and Reports	Permanent
Board of Managers/Finance Committee Minutes and Reports	Permanent
Insurance Policies	Permanent
Deeds and other Property Documents	Permanent
Architectural Plans	Permanent

Congregational History books/historical sketches (1 copy)	Permanent
Financial Records: <ul style="list-style-type: none"> <li>• Year-End Financial Statements</li> <li>• Governing Documents (Letters Patent, Certificate of Incorporation, Bylaws)</li> <li>• Official Receipts for Income Tax Purposes (Perpetual Endowment Gifts)</li> <li>• Official Receipts for Income Tax Purposes (10-year gifts)</li> <li>• T4 Summaries</li> <li>• Estate/Bequest files</li> </ul>	Permanent
Financial Records: <ul style="list-style-type: none"> <li>• Official Receipts for Income Tax Purposes</li> <li>• Church Offering Envelope Records</li> </ul>	3 years
Financial Records: <ul style="list-style-type: none"> <li>• T3010 Annual Charity Information Return</li> <li>• Bank Reconciliations/Bank Statements/Cancelled Cheques</li> <li>• Invoices/Receipts of Payment</li> <li>• Utilities and other Bills</li> <li>• Payroll records (T4s)</li> <li>• Approved Budgets</li> <li>• General Ledger</li> <li>• Monthly Trial Balances</li> <li>• Record of Employment (ROE's)</li> <li>• Donation Records</li> </ul>	7 years
Inventory Records	7 years
Personnel Records: <i>Note: these records are confidential</i> <ul style="list-style-type: none"> <li>• Any "Covenant of Care/Leading with Care" Agreements or incident documents</li> <li>• Employment/Volunteer Application Forms (<i>for successful candidates only</i>)</li> <li>• Police Records Check Log</li> <li>• Confidential Record of Reference Checks</li> <li>• Sick leave, time sheets, attendance sheets, vacation sheets, performance reviews, etc.</li> <li>• Suspected Child Abuse Report and Follow-up Report</li> <li>• Authorization and Consent for Minors</li> <li>• Employee &amp; Volunteer expense claims</li> </ul>	Permanent
Contracts/Agreements (service, maintenance etc.)	Keep as needed*
Correspondence (General correspondence, Session correspondence, etc.)	Keep as needed*
Congregational Organizations/Committees (i.e. WMS, Fellowship, Outreach, etc.)	Keep as needed*
Statistical Information forms	Keep as needed*
Directories/Lists (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 (i.e. Church Picnic, Christmas Pageants, etc.)	Keep as needed*
Orders of Service – significant services	Keep one copy of each
Newsletters	Keep one copy of each
Photographs	Permanent
Scrapbooks, Historical Information files (news clippings, info about the history of the buildings or property, information about memorial gifts, etc.)	May have permanent value*

\*Use your best discretion or contact the Archives for further guidelines

For advice and guidance on records management, please contact an Archivist at The Presbyterian Church Archives or visit our website at [www.presbyterianarchives.ca](http://www.presbyterianarchives.ca)  
1-800-619-7301 ext. 310 or ext. 266 | e-mail via <https://presbyterianarchives.ca/contact/>