­Records Management and Archival Preservation in the Congregation

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**Part 1: Managing Records**

Good recordkeeping practices are important for congregations for legal and historical reasons. An effective records management program involves managing active records (those that are added to or consulted frequently), organizing a historical archives, and ensuring the preservation of permanent records. This article is first in a four-part series that will briefly address records management and preservation practices in the congregation and offer resources for further consideration.

**Active record collections**

Congregations produce all kinds of records, many of which should be retained for legal and financial reasons. Examples include:

Financial

* Annual church budgets
* Payroll records
* Income and expenditures
* Fund raising and stewardship campaigns

Personnel and employment

* Letters of call to ministers, and records documenting the call process
* Employment history
* Benefits
* Records of disciplinary action

Membership

* Ministerial acts, including baptism, confirmations, marriages, and funerals held in the church
* Membership lists

Administrative

* Articles of incorporation, constitutions, and bylaws
* Minutes and reports of the church council, congregational organizations, and annual meetings.
* Records of official congregational activities, including Sunday school and vacation Bible school
* Property records, including deeds, mortgages, building plans, blueprints, and construction contracts
* Contracts and legal records
* Cemetery records (if the congregation owns one)
* Copies of reports submitted to the conference or denomination
* Official correspondence

Historical

* Worship service bulletins
* Newsletters
* Documents and photographs related to important events

**Records retention**

A records management policy with a document retention schedule is a helpful tool for effective management. The policy should provide guidelines and a timetable for records that should be kept permanently, those that should be weeded and destroyed after a prescribed period of time, and those that should be transferred to the congregation’s historical archives for preservation.

**Digital files**

A records management and retention plan should address digital as well as paper documents. Regular backups should be performed. One key to preserving digital files is redundancy—storing multiple copies in multiple physical locations. Services such as Dropbox and Microsoft OneDrive automatically create redundancy by storing copies in the “cloud” and on each device that is signed into the service. At least one copy should be stored at an offsite location.

**Records management responsibility**

Responsibility for managing and preserving records will involve a partnership between the pastor, clerical personnel, and lay leaders and volunteers. Larger congregations can often rely on paid office personnel to manage records. Small congregations can benefit from a small committee to create and implement record management and retention policies. A volunteer might be appointed as the church historian to oversee the congregation’s historical archives and assist with records management.

The records management policy will determine which documents have permanent value and should be retained indefinitely. The next article in this series will address historical archives in the congregation as a repository for documents of enduring value.

**For further reading**

“Managing Church Records”–Congregational Library

<http://www.congregationallibrary.org/churches/records-management#digital>

 “How Should We Preserve and Maintain Official Church Documents?”—Concordia Historical Institute

<https://concordiahistoricalinstitute.org/wp-content/uploads/2018/01/2B_How-should-we-preserve-and-maintain-official-church-documents.pdf>

“Which Agency Records Should be Retained or Destroyed?”—Concordia Historical Institute

<https://concordiahistoricalinstitute.org/wp-content/uploads/2018/01/2C_Which-agency-records-should-be-retained-or-destroyed.pdf>

“Records Management for Congregations: An Archives Manual for Episcopal Parishes and Missions”—Archives of the Episcopal Church

<https://www.episcopalarchives.org/sites/default/files/RecManManual_rev_07-2017.pdf>