

# Equipping for ...

## The Culture of Change



The continuing process of restoring the life, worship, and mission of the church inevitably involves change under the continuing guidance of the Spirit. However, proposing and implementing a change (no matter how small) often mobilizes resistance; which is normal - we all like what we know. Here are some thoughts on the pastoral aspects of change to help leaders and groups as they contemplate and engage in change.

### Vision

- Change in the church is oriented towards the Kingdom of God and not done solely for the sake of change or personal comfort and taste.
- Discern a vision don't impose a desire.

### Insight is important

Be clear within yourselves about the purpose of any change. Be honest among yourselves why you consider a specific change a wise thing or not a wise thing. (Remember, both the desire for change and the resistance to change can be idols we cling to.)

### Energy

Pour energy into building up and creating new things rather than amending and ending current practices or programmes. Sometimes change happens naturally when people get excited about and invested in something new.

### Education is essential

Neglecting to provide adequate education about the theological and practical reasons for a change is one of the greatest hindrances to effective change management. Some well-done, creative, and stimulating education about the themes attending a change in practice or policy is endlessly helpful.

### Communication is key

Understanding in a congregation or system is uneven and it is important never to assume everyone understands the changes being proposed or their implications. Carefully disclose often and in different ways why, when, how, who is involved, what is



expected, how much things will cost, etc. when communicating information about change.

## Timing

- Change, like all good things, takes time; don't rush or force it.
- "Strike when the iron is cold." Sometimes making a change in reaction to a contemporary situation (unless the matter relates to personal safety, etc.) can be complicated, misguided, and even hurtful.
- Too much change at once can guarantee resistance to all change.
- *The Past:* change brings up pastoral issues related to loss, feelings of being left out, and nostalgia. It is important to honour what has been in some meaningful way.
- *The Present:* While it is important to respond to the needs of the present it is also important to remember that the status quo is already responding to some need. Take time to learn from people what a change will mean for them and how it might impact their identity or spiritual practices.
- *The Future:* Change mobilizes anxiety about what the future will look like; work with those who are concerned to identify issues and imagine a resolution together.

## "Decently and in Good order"

Use polity as a helpful guide and a means to accomplishing good work transparently and judiciously with discernment, and not as a weapon or a scapegoat.

## Prayer

Prayer, as an aspect of discernment, is essential. However, prayer and public worship that is used as a means of imposing a view of vision on people may be regarded and resented as manipulative.

## Courage

As you enter into a time of intentional change, remember the language Moses gave to the people of God as they were about to pass into new territory: "be strong and of good courage".

## Faith

Continually work to build trust in relationships and church structures so that when change is introduced people will have justified confidence that things are being done for good reasons and in the best possible ways.

## Hope

Have patience. Nothing is ever completely realized in any one ministry, place or time, so leave room for hope.

## Love

Disunity should never win the day. When any one person or group wins in a contentious situation everyone ultimately loses to some extent. The pastoral relationships that comprise our life together are more important than many of the things in our common life that we feel need substantial or sudden change.

It may not be the front-line of mission and evangelism, but managing your congregation's records and information is extremely important.

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## Leadership

Holy Conversations

Healthy Congregations

Pathway to Renewal:  
Practical Steps for  
Congregations

The Practicing  
Congregations

Imagining the Small  
Church

Where 20 or 30 Are  
Gathered: Leading  
Worship in the Small  
Church

Practicing Balance:  
How Congregations  
Can Support Harmony  
in Work and Life

Congregational  
Leadership in Anxious  
Times

Discerning God's Will  
Together: A Spiritual  
Practice for the Church

Grace for the Journey:  
Practices and  
Possibilities for  
In-between Times

Consider adding these Alban  
Institute resources to your  
library.

# Managing Your Congregation's Records

Bob Anger, Assistant Archivist  
Archives and Records Management

Every ministry 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 in Archives is what records need to be kept and what can be disposed of. Certain records created by ministries 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 two 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 a marriage record to 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. Some statistics indicate that we spend as much as 40% of our work time searching for stored information; others suggest one to two hours per day. Having an organized set of paper and computer files, will be a

blessing when you are faced with a situation where a specific document or information 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 congregations 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.

The table below lists records and the length of time they should be kept. This list is not exhaustive, and ministries will likely have documents beyond what is noted. (The chart is designed for Presbyterian ministries 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 Archives and Records office. We will be happy to answer any questions and assist in any way we can. You can reach us by telephone at 1-800-619-7301 or by email to [karnold@presbyterian.ca](mailto:karnold@presbyterian.ca) (Kim Arnold, Archivist) and [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).

## Type of Record/File/Register

## How Long to Keep

Session minutes. . . . .	Permanent
Baptism, marriage, burial registers. . . . .	Permanent
Historic rolls (Membership Roll). . . . .	Permanent
Communion rolls and registers. . . . .	Permanent
Annual reports . . . . .	Permanent
Congregational meeting minutes. . . . .	Permanent
Trustee minutes. . . . .	Permanent
Board of Managers/Finance Committee minutes. . . . .	Permanent
Minutes/reports of sub-committees of Session (Mission, Worship etc.) . . . . .	Permanent
Minutes of congregational organizations (WMS, Ladies Aid, etc.) . . . . .	Permanent
Insurance policies. . . . .	Permanent
Deeds and property documents. . . . .	Permanent
Architectural plans. . . . .	Permanent
Legal documents/contracts/agreements. . . . .	Permanent
Congregational history books (1 copy). . . . .	Permanent
Financial records:	
General ledger (if applicable)	
Year-end financial statements (if not in an annual report)	
Official receipts Income Tax purposes (perpetual endowment and 10 year gifts)	
T4 summaries. . . . .	Permanent
Financial records:	
Bank reconciliations/bank statements/cancelled cheques	
Invoices/receipts of payment	
Official receipts for income tax purposes	
Church offering envelope records	
Approved budgets	
Monthly trial balance. . . . .	7 years
Personnel records:	
Employment applications (for successful candidates)/employment contracts	
Performance reviews	
Covenant of Care/Leading with Care agreements/police record check log	
Any Leading with Care incident documents	
Any disciplinary information documents (if applicable)	
Resignation/termination documents . . . . .	Permanent
Personnel records:	
Sick leave, time sheets, attendance sheets, vacation sheets, etc. . . . .	7 years
Statistical information forms . . . . .	7 years

### Other Considerations

Sunday School/Bible Study resources (curriculum, study guides etc.) . . . . .	Keep as needed
Special events files (church picnic, Christmas pageants, etc.) . . . . .	Keep as needed
Orders of service/bulletins - significant services (1 copy of each) . . . . .	Keep as needed
Newsletters (1 copy of each issue). . . . .	Keep as needed

# Charitable Status



As registered charities, ministries are required to engage only in allowable activities as they carry out the ministry's charitable purposes. The Canada Revenue Agency (CRA) states that a registered charity is allowed to carry out its charitable purposes in only two ways: by carrying on its own charitable activities (that serve to promote the charity's purposes) and by gifting to qualified donees (A qualified donee is an organization that can issue official donation receipts for gifts it receives from individuals and corporations. It can also receive gifts from registered charities.).

A registered charity is not permitted to carry out its purposes by simply disbursing its money or other resources to an individual or to another organization that is not a qualified donee. Gifting to a non-qualified donee puts the status of registered charities in jeopardy. This means that ministries must comply fully with required standards of the Denomination and CRA and ensure all donations are to be made to qualified donees (i.e. other registered charities).

Annual reporting to the CRA is an integral part of retaining registration as a charity; failure to do so could result in the revocation of a ministry's charitable status. Examples of other factors that could see a status revoked include gifting to organizations that are not qualified donees, political activity by the ministry, participating in activities that are illegal or contrary to Canadian public policy, or providing personal benefits (e.g. ministries making part of their income payable to members).

If your ministry is not currently registered with the CRA as a charity, consider the following advantages and requirements:

The **advantages** of being a registered charity are:

- ministries are allowed to issue official receipts for gifts received
- ministries are exempt from paying income tax

The **requirements** of a registered charity are:

- devotes its resources to charitable purposes
- meets requirements of registration in respect to charitable purpose
- files T3010, Registered Charity Information Return, within six months of fiscal year end

Visit [www.cra.gc.ca](http://www.cra.gc.ca) for information on:

- [how to register for charitable status](#)
- [gifts-in-kind](#)
- [sample receipts](#)
- [donating to a specific cause \(e.g. a mission trip participant\)](#)
- [asking for permission to accumulate property \(e.g. accumulating funds for capital projects\)](#)

The standards and expectations of CRA compliance change occasionally. It is important for ministries to remain current. Additional information is available from [www.cra.gc.ca](http://www.cra.gc.ca).

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Deuteronomy 6:5-7 (CEB)

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[www.apcenet.org/2014-annual-event.html](http://www.apcenet.org/2014-annual-event.html)

Pam Ramseth and Anne Yee-Hibbs, 2014 APCE Annual Event co-chairs

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