



RETENTION OF (ACTIVE) CONGREGATIONAL RECORDS

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INTRODUCTION

Records retention is the practice of storing, maintaining, preserving, or destroying the digital and physical files created by a governing body. Certain records have definite long-term value to your congregation and should be kept permanently (archived). These include things like Session minutes, congregational meeting minutes, and registers. These records can provide legal, historical, or fiscal importance. Other records help support a business need and should be kept for a period but can be disposed of once that time is over. Destroying documents that do not have permanent retention helps reduce the number of records within a holding, making it easier to find what you are looking for. Following a retention schedule is the easiest way to know how long to keep a record for.

Permanent records should be supported not only by being stored in a safe and secure way, but also by creating preservation copies. Digital files should be backed up onto a hard drive or the Cloud. Physical records should be sent to the Archives for digitization.

RETENTION SCHEDULE

A retention schedule describes how long a record type should be maintained prior to destruction or archiving. Currently, the Archives only accepts records of dissolved congregations. Therefore, it is the responsibility of each congregation to appropriately maintain their record collection.

Record Type	Retention
Church Registers – Baptism, Marriage, and Burial	Permanent
Session Minutes and Reports	Permanent
Professing Members Roll (Communion Rolls & Registers/Historic Roll)	Permanent
Annual Reports	Permanent
Congregational Meeting Minutes and Reports	Permanent
Congregational Directories	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
Photographs	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 	Permanent
Financial Records: <ul style="list-style-type: none"> • Official Receipts for Income Tax Purposes • Church Offering Envelope Records • Workplace Safety and Insurance Board (WSIB) forms 	3 years
Financial Records: <ul style="list-style-type: none"> • T3010 Annual Charity Information Return • Bank Reconciliations/Bank Statements/Cancelled Cheques • Invoices/Receipts of Payment • Utilities and other Bills • Payroll records (T4s) • Approved Budgets • General Ledger • Monthly Trial Balances • Record of Employment (ROE's) • Donation Records • Employee & Volunteer expense claims 	7 years
Inventory Records	7 years
Personnel Records: <i>Note: these records are confidential</i> <ul style="list-style-type: none"> • Any "Covenant of Care/Leading with Care" Agreements • Incident documents • Employment/Volunteer Application Forms (<i>for successful candidates only</i>) • Police Records Check Log • Confidential Record of Reference Checks 	Permanent

<ul style="list-style-type: none"> • Sick leave, time sheets, attendance sheets, vacation sheets, performance reviews, etc. • Suspected Child Abuse Report and Follow-up Report • Authorization and Consent for Minors 	
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*
Sunday School/Bible Study resources (curriculum, study guides etc.)	Keep as needed*
Orders of Service – significant services	Keep one copy of each
Special Events files (i.e. Church Picnic, Christmas Pageants, etc.)	Keep as needed*
Newsletters	Keep one copy of each
Scrapbooks, Historical Information files (news clippings, info about the history of the buildings or property, information about memorial gifts, etc.)	May have permanent value*

* Indicates that further context is required to determine how long a record is useful to maintain and whether that record holds permanent archival value. Use your best discretion or please contact The Presbyterian Church Archives (archives@presbyterian.ca) or visit our website at presbyterianarchives.ca for further guidance.

Additional policy of The Presbyterian Church in Canada Archives can be found in Appendix G of The Book of Forms.