



TRANSFER OF DISSOLVED CONGREGATIONAL RECORDS

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INTRODUCTION

The Presbyterian Church in Canada Archives is the primary caregiver for records of dissolved congregations. As stated in section G-3 of the Book of Forms, records generated by all courts of the church remain property of the church. Following a dissolution, it is the responsibility of Presbytery Clerks to aid in the collection of records and transfer them to the Archives. This process ensures that records can continue to be preserved, protected, and accessed.

Records are expected to arrive safely to the Archives (50 Wynford Drive, Toronto, ON) via vehicle transportation or tracked mail. Digital records should be provided on a USB, external hard drive, or via Cloud transfer. Archivists should be consulted prior to the delivery or shipment of records to ensure best practices are in place.

It is encouraged that amalgamating congregations bring their record collections together to reflect the continuing history of their community.

RECORDS TO TRANSFER

- Church Registers – Baptism, Marriage, and Burial
- Session Minutes and Reports
- 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 – one copy of each

Photographs

Note: It is encouraged that photographs of the exterior and interior of the building, memorial plaques, honor rolls, special stained-glass windows, etc. be taken prior to vacating the building.

Orders of Service (significant services) – one copy of each

Newsletters – one copy of each

Other items of historical significance relating to the congregation such as scrapbooks, community projects/events

Permanent Personnel Files

Covenant of Care/Leading with Care agreements

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

Employment/Volunteer Application Forms (for successful candidates only)

Permanent Financial Records

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 – Within the last 8 years (shred older files)

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
- Employee & Volunteer expense claims

Recent Financial Records – Within the last 4 years (shred older files)

- Official Receipts for Income Tax Purposes
- Church Offering Envelope Records
- Workplace Safety and Insurance Board (WSIB) forms

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