MISSOURI BAPTIST
**HISTORICAL
COMMISSION**

Records Management for Churches

Church records management is an area that nobody in the church thinks about; they simply expect that when they need access to a record, someone from the church will be able to find it. While we all wish records were that simple, the fact is that efficient management of records requires some thought and planning to make accessing them go smoothly. This brochure is intended to be used alongside the CHURCH RECORDS RETENTION SCHEDULE (available on this website) to make this process easier.

What is Records Management?

Records management (RM) is defined as the practice of identifying, classifying, archiving, and methodical destruction of records. Simply, records management includes all the processes involved in making records findable, usable, and savable or destroyable.

Why do Records Management?

- Know what you have
- Know what you need to have – and don't need to have
- Know how to store what you need
- Know how to get rid of what you don't need

Records, like people, have stages of life. A record goes through three stages in its life cycle: active use, semi-active use and storage, and final disposition. During *active use*, the record is referenced frequently and needs to be close at hand. When the record is not accessed as often, it moves to *semi-active* use. Generally at this point in the lifecycle, the record is being kept to satisfy a specific need to have it, but is moved out of file cabinets and into boxes in the basement or other storage area. *Final disposition* is the point at which records are destroyed or are moved to permanent storage in the church archives.

Vital records are a facet of RM to watch carefully. Vital records are defined as "records or documents which, for legal, regulatory, or operational reasons, cannot be irretrievably lost or damaged without materially impairing the organization's ability to conduct business." Vital records for a church would include such items as minutes, deeds, plans for the building, and other types of records that cannot be replaced easily, and would limit the church in recovering from the kind of disaster in which records often are destroyed.

A business record is created to document one of four activities: Legal activities, administrative activities, fiscal activities, or historical activities. Records that document legal, administrative, or fiscal activities may also have historical value. It is important to

know what purpose a record serves, so the length of time to keep it can be identified. A records schedule can help in organizing records into their purposes, so that RM functions can be more easily performed.

Getting started with Records Management

Once your church business office has decided to institute a RM program, these ideas can help ease the process along:

Get support
- Get support to clean up records
- Enlist help of church's historical committee, if one exists
- Locate all places where records are stored or "hidden"

Gain control of your records

Inventory your records. This step is necessary to learn what records the church has, in what quantity they exist, and where they are located, in the building or outside the building. Remember to check if the church has a safe deposit box that holds vital records, such as property deeds, mortgage notes, etc.

You will most likely discover that documents that hold the same information may have been called by different names during the history of the church. The inventory helps you to identify all the different names used for the same kind of records. It will also help you find duplicate copies of information that have been stored in various places throughout the church. You should be able to make immediate headway on reducing storage needs by destroying duplicate information, and transferring historical records, such as bulletins and photographs, to the archives, if your church has one established.

When performing the inventory, be sure to identify the storage area where records are located, the amount of each type of record, and how it is arranged, whether in chronological, alphabetical or numerical order. (Sample inventory form and blank inventory form are available as part of this web publication.)

Schedule your records

Once an inventory has been completed and records series identified, a group of church members should examine the Missouri Baptist Historical Commission suggested records schedule (available on this website), and make any changes it needs to meet the approval of the church. This records schedule tells how long after creation the records series should be retained, and how long it should be located in active or semi-active storage or transferred somewhere to be retained permanently. Church members with specific expertise in finance, law, administration, or history should be helpful in these decisions. This document is not legally binding on any church to accept as-is, but should be used to guide best practices in the area of disposal of church records.

Once the records schedule has been approved, try to obtain a vote of the members to allow implementation and destruction of records at any time when following the approved. This will allow you to destroy records whenever they meet their retention and then simply submit the list to the church minutes, rather than obtaining a vote to approve destruction each time you have a new list of records to destroy.

Implement the schedule

Once the records schedule has been approved and the inventory has been completed, it is time to implement the schedule. Using the filled-out inventory forms, use the retention schedule to locate a record series, then write on the inventory form how long the box must be kept and when it can be destroyed. Using an example of a box of records of the same series from 1989-1994 that must be kept for 7 years, the inventory form should show both 1989-1994 and show the destruction date as January 1, 2002 (seven years from the first day they could be destroyed.) Take the completed inventory forms and mark the destroy dates on the boxes to which they correspond. You may want to use a specific colored marker for boxes that you will be able to destroy immediately. That would make them easier to spot when it is time to pull out all the records for destruction.

Once all records are identified and marked by their eligible destruction date, compile a list of records to be destroyed, and submit them to the church for approval.

When doing destruction, remember to set aside a place for the boxes to be gathered together to wait for destruction. Also remember to notify the custodial staff, so they do not move the boxes before you can destroy them.

Records that contain sensitive information should always be destroyed by shredding or burning. These would include anything with a Social Security Number or a bank account number. Any records that do not contain sensitive information can be destroyed by recycling, landfilling, or burning.

Stay up-to-date

Once the records schedule has been implemented and storage room has been made by destroying eligible records, keep the records up-to-date by marking boxes with contents, date span, and eligible destruction date when boxing them or removing them from file cabinets. This will enable painless destruction of records simply by locating boxes marked for destruction and listing them for the church minutes.

The Missouri Baptist Historical Commission hopes that this information will be useful to churches in maintaining control over records. Please contact the MBHC archivist at 800-736-6277 with questions.

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