



MISSOURI BAPTIST
**HISTORICAL
COMMISSION**

RECOMMENDED RECORDS RETENTION SCHEDULE

Approved April 25, 2008

These are guidelines only, and are not intended to offer legal advice, but to suggest best practices.

Administrative Records

Record Series	Active retention	Inactive retention
A. Architectural and mechanical drawings	While current	Permanent
B. Business meeting minutes	3 years	Permanent
C. Church publications		
1. Bulletin (include inserts)	2 years	Permanent
2. Newsletters	2 years	Permanent
3. Special publications, programs from special events, brochures	2 years	Permanent
C. Committee records		
D. Correspondence		
1. Administrative (legal, personnel related)	2 years	Permanent
2. General	2 years	Evaluate for historical value
E. Equipment Includes purchase documents or lease contracts, and service contracts	Until equipment is discarded or returned to lessor	
G. Insurance records (real property and automobile)	While policy in effect	10 years

H. Inventory records	Until updated	2 years past updated
I. Photographs, slides, audio & video tapes, DVDs	5 years	Evaluate for historical value
J. Policies and procedures	Until updated	Permanent
K. Resource/subject files	While current	Dispose when obsolete

Financial Records

A. Audit reports	While current	Permanent
B. Balance sheets	While current	Permanent
C. Bank deposit statements	3 years	Discard (shred if account # listed)
D. Checks		
1. Cancelled, payroll, vouchers	10 years	Discard
2. Check register	20 years	Discard
E. Fidelity bonds	3 years	Retain when historically applicable
F. Financial statements		
1. Periodic	3 years	Permanent
2. Certified	3 years	Permanent
G. Investments	While current	Permanent
H. Invoices from suppliers	2 years	Discard
I. Journals, ledgers	While current	Permanent
J. Members' offering records		
1. Year-to-date records	1 year after complete calendar year	Shred to destroy, to maintain confidentiality
2. Annual statements	7 years	Shred to destroy, to maintain confidentiality
K. Stewardship		
1. Commitment cards	Retain in office for	Shred to destroy, to maintain

2. Completed Budgets	period covered 3 years	confidentiality Permanent
L. Travel expense records	3 years	Discard

Legal Records

A. Bonds and related records	3 years past completion of bond	Permanent
B. Charter, constitution, by-laws	Keep copy of current documents in office	Permanent; Original documents in vital record storage
C. Contracts	1 year after completion	
D. Endowments/wills	Convenience copy	Permanent
E. Incorporation records	Convenience copy	Permanent; Original document in vital record storage
F. Licenses (federal, state, local, notary)	Current	
G. Property records, deeds, mortgages, land records	Convenience copy	Permanent; Original documents in vital record storage

Membership Records

A. Chronological roll	Current	Permanent, when transferred to Historical Committee
B. Church member registration, decision record, letter of transfer	Current	Permanent, when transferred to Historical Committee
C. Master member record	Current	Evaluate for transfer to Historical Committee
D. Record correction slip	Discard at end of	

	calendar year	
E. Request for church letter	Discard at end of calendar year	

Personnel Records

No individual employee records should be transferred to or stored by the Historical Committee. They should be kept in locked storage and maintained only by personnel office staff.

A. Individual employee file: Contains (but not limited to) Application, I-9, changes in status, termination, sabbatical or long-term leave approval, performance appraisals, tax records, retirement/annuity records	Retain 3 years after resignation or termination of employee	SHRED TO DISCARD
B. Job description/organization chart	Retain in personnel 6 years after being superseded	
C. Group insurance plan	While active	Permanent, keep in Historical Committee once superseded
D. Personnel manual	Convenience copy; discard when superseded	Original for permanent storage

Program organization records

These are the records of Sunday School departments (organized by department and class), Women's Missionary Union, Brotherhood, and all other intra-church organizations. These should be handled as desired by each organization. If there is a Historical Center, the records (complete or edited and consolidated) may be deposited there.

Choir records will be maintained as specified by the minister of music. Historical Center will receive any material of the Music Ministry as deemed historical.

The Missouri Baptist Historical Commission hopes this information is helpful to churches. For further assistance or comment, please contact the MBHC archivist at 800-736-6227.

