

Bethlehem Evangelical Lutheran Church Records Policy

PURPOSE

The congregation of Bethlehem Evangelical Lutheran Church (the “Church”) is a community of baptized persons that worships, learns, witnesses and serves. To this end, the congregation recognizes the importance of preserving records for historical, legal, and operational value for an appropriate period of time via media that can be readily access in the future. This policy is maintained by the Congregation Council.

SCOPE

This policy provides direction for the identification, storage, retention, and disposal of Church records. ‘Records’ and ‘Archives’ are different. ‘Records’ are documents that record actions, whereas ‘Archives’ are more related to preserving the history of the Church. The scope of this policy relates to records; archives are covered separately.

More specifically, ‘records’ are those documents that hold evidential value for the congregation. The official papers, correspondence, and other records created or received by BELC (pastor and staff), its officers, and organizations belong to the Congregation. This includes all congregational records in any format, whether paper, electronic, or any other media. All such materials qualify for consideration for archival preservation following complying with the retention schedule provided below. Records should not be thought of as the property of the pastor(s) or any other individual member who maintains or produces them.

POLICY

Church records, as defined herein shall be retained and maintained by the church office under the cognizance of the Office and Business Manager. Records should not be altered, mutilated, concealed, deleted, destroyed, or otherwise disposed unless allowed by this policy or specific authorization of the Congregational President AND the Church office. All records should be inventoried as to their historical, legal, and operational value on a timely basis. Materials considered for the archives should be kept in a central filing area until they can be processed or appropriately destroyed.

RECORDS TO BE PRESERVED

Hardcopies of the following records shall be maintained according to this policy and properly preserved for the period of time indicated: .

Records Preservation

1. Records/archives should be located in a locked room that is least affected by the extremes of light, heat, and weather.
2. To the extent possible, materials should be protected from fire/flood damage.
3. Damaged or deteriorated documents and records should be placed in archival preservers such as are used for photographs.
4. Records should be inspected periodically for atmospheric and vermin damage, and appropriate steps taken to remedy any damage if found.
5. Electronic records, storage media such as computer hard drives, tapes, disks, flash drives are susceptible to damage and obsolescence cannot be used as “records” for permanent storage.

Anyone wishing to view or research records/materials must notify the Church office and make the necessary arrangements to ensure the records/materials are properly handled during viewing. No documents or records should be removed from the property of BELC unless specifically authorized by the Congregation Council.

Retention/Disposition

BELC records shall retained according to the following:

Record	Retention Period	Comment
Articles of Incorporation and amendments thereto	Permanent.	
Constitution and amendments thereto; and Bylaws and amendments thereto	Permanent.	
Registers recording the ministerial acts, including baptisms, confirmations, marriages, burials, etc.	Permanent.	
Signed Election Teller Sheets	Permanent	Required by By-Laws, Sec. III, Item 5(e).
Minutes of meetings of the congregation, Congregation	Three (3) years.	Following retention, records shall be considered

Council, Ministry Teams, Committees, Task Forces, Advisory Committees, etc.		for archiving.
Congregational Annual Reports	Three (3) years.	Following retention, records shall be considered for archiving.
Current list of all members of the congregation	Three (3) years.	Following retention, records shall be considered for archiving.
Current list of officers and members of the Congregation Council, Ministry Teams, Committees, Task Forces, Advisory Committees, etc.	Three (3) years.	Following retention, records shall be considered for archiving.
All official correspondence directed to, and sent from BELC	Six (6) years.	
Copies of Calls extended to pastors, rostered leaders, and other professionals which are accepted	For duration of Call plus three (3) years.	Following retention, records shall be considered for archiving.
Records of any disciplinary actions of pastors, rostered leaders, staff, and other professionals	For duration of Call plus three (3) years.	
Sunday bulletins, programs for special events, congregational newsletters and letters to the membership	Three (3) years.	
Copies of deeds to the parsonage and the church and descriptions of the church properties, titles, survey, and leases, if any	Permanent.	
All contracts for the construction of congregational buildings and facilities, including all plans, specifications, blueprints, and drawings	Contracts: three (3) years following completion; Drawings: permanent unless demolished by new construction.	Following retention, records shall be considered for archiving.
Mortgages and insurance documentation	Mortgages: six (6) years; Insurance: three (3) years.	

Reports to the Rocky Mountain Synod and the ELCA	Three (3) years.	Following retention, records shall be considered for archiving.
Records and registers of gifts and memorial given to BELC (including the BELC Endowment)	Disposition/ Acknowledgement plus three (3) years.	Following retention, records shall be considered for archiving.
Annual Audit Report (financial report) and General Ledger	Permanent	
Cancel checks, check register, bank statements, deposit slips, and bank reconciliations.	Six years (6) beyond current tax year.	
Payroll administration records, e.g. W-2, W-4, and payroll registers; cash receipt journals, and record of membership giving.	Six years (6) beyond the current tax year.	Because pastors normally remit their Social Security (SS) contributions as self-employed persons, according to the Federal Govt. definition regarding ordained ministers for SS purposes, pastors are responsible for checking the accuracy of their records with the SS Administration. They should request a report of their contributions from the SS Administration every 5 years.
General invoices	Three (3) years.	
Contribution Envelopes	One (1) year.	

Rev	Rev Date	Review Date	Summary of Revisions
0	7/26/07		UNK
1	8/2011	2013	Reformatted; expanded list of records; retention period, and storage media.