

# Evangelical and Reformed Historical Society

## Guide to Arrangement for Local Church Records



Created February 2017  
Revised March 2022

## **Appendix C: Guide to Arrangement and Description of Local Church Records**

Church records are vital to the life of every congregation. Not only is the church's story told in its records, but the current work of the church is also recorded. Often churches do not think about their records until a significant anniversary is celebrated, a church profile needs to be developed, or a disaster destroys the records. The retention, organization, and preservation of records enables the church to respond to these events. Records are also vital for the church's understanding of itself. For churches to understand why they currently have a particular mission or what their current ministry is, they need to understand their history and follow what has happened in the past that influences the present and helps to plan for the future.

As an aid for churches to begin the process of gathering, organizing, and preserving their records, this guide provides both a method of organizing local church records and standardized terms to describe the various types of records usually found in local churches. The list is not exhaustive and records will probably be found which do not fit exactly into this suggested scheme. In such cases a new term can be devised or the records can be placed as a subgroup under one of the larger headings. In any case, a note should be made describing how the records were handled. In addition to suggesting this list be used by local congregations, the Evangelical and Reformed Historical Society uses the list when organizing and describing local church records in its collection.

Particularly important for local churches is the need to identify and preserve vital records. Vital records are those needed to conduct the life and work of the church if a disaster should occur. Although the definition of vital records may vary from church to church they usually include: constitution, charter, current deeds, membership and giving records, current budget and financial report, baptisms, confirmations, marriages, funerals, list of bank accounts with account numbers, current insurance policies, consistory or council minutes. To ensure the availability of these records they should be copied and the copy stored off site in a designated repository. Copying can be in any of a number of formats: photocopies, digitization, or microfilm. If digitization is the selected method of preservation, the information should be transferred to another format of digital media in addition to being preserved as a PDF file or other viewable medium. This ensures that the digital files will be accessible and to stay current with technological advances.

The Evangelical and Reformed Historical Society is the designated repository for all records of the former Reformed Church in the United States and the Evangelical and Reformed Church as well as its local congregations founded before 1957. The archivist is available for workshops on church records and to consult with churches on an individual basis. The Society encourages churches to take a records inventory and send a copy to the Society to be included in your church's file.

## Arrangement of Records

1. ANNUAL REPORTS (these are usually prepared by the various committees for distribution at the congregation's annual meeting)
2. ARTIFACTS (Including communion ware, anniversary plates, offering plates, etc. After deciding which items are to be permanently retained they are entered into an artifact database and housed in appropriate acid-free containers)
3. AWARDS, CERTIFICATES, RECOGNITIONS, ETC.
4. BULLETINS (A random sampling of Sunday and special worship service bulletins are kept as a record of the types of services held, the order of service, hymns, etc.)
  - a. For "regular" Sunday services (usually those between Pentecost in late spring/early summer and Advent) select five bulletins from every decade.
  - b. For high holy days select three Advent bulletins, two Christmas eve bulletins, one Epiphany bulletin, three Ash Wednesday bulletins, two midweek Lenten bulletins, two Maundy Thursday and two Good Friday bulletins, two Pentecost bulletins, and two Thanksgiving bulletins for every decade.
  - c. Bulletins reflecting social, political, cultural and natural disasters (e.g., JFK's and MLK's assassinations, Civil Rights events, 9/11, Vietnam War, Black Lives Matter, COVID-19, etc.) will take more time to identify as a worship service may not follow such events on the Sunday closest to them, perhaps appearing one or two weeks or more after the event. Therefore, the bulletins for several Sundays after such events should be checked. If a bulletin is found that reflects the events, it should be kept.
5. CEMETERY and CEMETERY ASSOCIATIONS
  - a. Burial records
  - b. Constitution
  - c. Minutes
  - d. Plot maps
  - e. Tombstone inscriptions
6. CHARTER and/or INCORPORATION DOCUMENTS (These are usually legal documents specifying the legal name of the congregation, the date of founding, and its non-profit status.)
7. CHURCH RECORDS
  - a. Baptisms
  - b. Confirmations
  - c. Marriages
  - d. Deaths
  - e. Communicants
  - f. Directories and Membership Lists

- g. Attendance Records (these are not generally retained permanently)
  - h. Guest Registers (these are not retained permanently)
  - i. Transfers In and Out (these are not generally retained permanently provided the information is found in the church's master record book)
  - j. Statistical Reports.
8. CONGREGATIONAL MEETINGS (This category is for minutes and actions from congregational meetings kept separately from annual reports and/or Consistory minutes.)
9. CONSTITUTION AND BY-LAWS (Organized chronologically)
10. FINANCIAL RECORDS (These are permanently retained records. Bank statements, canceled checks, paid invoices, vouchers, etc. need only be retained for as long as necessary following local, state, federal and other legal requirements. Churches should consult with their legal counsel and financial advisor about length of retention)
- a. Annual Treasurer's Report (These are often included in the Annual Reports, #1 above. If so, they need not be included here.)
  - b. Auditor's Reports
  - c. Bank Records (see the note above about retention)
  - d. Budgets (only the final approved budget for each year need be kept)
  - e. Endowment/Investments (include all organizational and governing documents, annual reports, audits)
  - f. Ledgers (often referred to as Treasurer's Books, these contain details of income and expenses, assets and liabilities)
  - g. Offering (the amount given/pledged each week by members are not retained)
  - h. Pew Rents
  - i. Subscriptions (Often in early churches expenses were met by members pledging a certain amount toward a specific item such the pastor's salary, building fund or renovations, organ fund, parsonage fund, etc.)
  - j. Taxes
11. HISTORY (Includes published histories, pamphlets, booklets, news clippings, anniversary celebrations, etc.)
12. LEGAL AND BUSINESS RECORDS (These can be combined as here or made two separate categories depending on the quantity of records)
- a. Bequests
  - b. Deeds, Indentures, Bonds, etc.
  - c. Insurance policies (not permanently retained)
  - d. Personnel records including pastors (Includes W4 dependents form, W2 wage and tax statements, salary reports, job descriptions, performance evaluations, termination letters and/or agreements, contracts. Only biographical information and job descriptions should be retained permanently. Pastor information may instead be included in the Pastor category, number 15.

- e. Property (including blue-prints)
13. MEMORIALS (Monetary or Other Gifts)
14. NEWSLETTERS (These are an important record of the activities and programs of the church)
15. PASTORS (if not included in #11 above. Include full name, birth and death dates, churches served, biographical information, correspondence, pastoral letters, photographs).
16. PHOTOGRAPHS (This category includes pictures of the exterior and interior of the church building and pastors if not filed under Pastors, number 15. A representative selection of photographs of church members and activities are kept only if they are identified in pencil on the back of each photo with names, activity and date).
17. PROGRAMS AND ACTIVITIES (This category includes informational brochures and promotional materials about the church as well as information about special programs and activities which the church developed and implemented as part of its ministry such as Heifer Project, One Great Hour of Sharing, mission projects, building projects, fund raising projects, Christmas programs, etc.)
18. SCRAPBOOKS
19. COMMITTEES
- a. CONSISTORY, COUNCIL (or its equivalent)
    - i. Minutes
    - ii. Reports
    - iii. Other
  - b. DEACONS
    - i. Minutes
    - ii. Reports
    - iii. Other
  - c. ELDERS
    - i. Minutes
    - ii. Reports
    - iii. Other
  - d. CHRISTIAN EDUCATION (Until the 1920s and often later, the Sunday School was established as a separate entity with its own officers, its own treasury, its own organization. Beginning in the 1920s Sunday Schools often became an integral part of the organization of the local congregation and the name was often changed to Christian Education Committee. This category is for minutes, programs, etc. of the Christian Education

Committee. Use Auxiliary Organizations. Sunday School for records of the more independent Sunday School of the 19<sup>th</sup> and early 20<sup>th</sup> centuries.)

- i. Minutes
- ii. Financial Records (if kept separate from general church financial records)
- iii. Reports
- iv. Other

e. MUSIC

- i. Choirs (includes information on the purpose and membership of choirs)
- ii. Directors and Organists (includes information about the individuals)
- iii. Programs and history (includes information about various programs carried out by the choirs, printed programs for events, and a history of music and music groups in the congregation)

f. OTHER COMMITTEES (Worship, Outreach/Social Action, Evangelism, Stewardship, Pastoral Relations, etc. Records should be organized the same as those for Christian Education.)

## 20. AUXILIARY ORGANIZATIONS

a. Sunday School. (See the note under Christian Education for the difference between Sunday School and Christian Education.)

- i. Minutes
- ii. Financial Records (if kept separate from general church financial records)
- iii. Membership and/or Attendance Records (these are not retained permanently)
- iv. Programs (includes information about various programs carried out as well as printed programs for various events)

b. Women's Group

- i. Constitution and By-Laws
- ii. Financial Records
- iii. Membership/Attendance Records
- iv. Minutes
- v. Programs

c. Men's Group (Organized the same as Women's Group)

d. Youth Group (Organized the same as Women's Group)

e. Others as needed