



GRACE LUTHERAN CHURCH

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Policy for Records Management

At the end of the calendar year, each person working for GLC (Council members, appointed officers, others doing tasks for GLC) should:

1. Review the records, notes, messages that were used in performing their duties,
2. Determine what their disposition should be, using the GLC Policy table below,
3. Electronic items that should be saved should be sent to the Church secretary and/or the Pastor, physical items should be delivered to the GLC office,
4. The rest should be destroyed (a person whose term of service is not over may retain items until then),
5. If one has a reason to retain any records beyond the above limits, request permission from the Church Council,
6. Notify the Council Secretary that you have done this.

NOTE: E-mail and digital files are especially vulnerable to loss. E-mail and digital files that represent the policies, program, and ongoing life of the congregation should also be printed out to be saved.

NOTE: Anyone using their home computer for church business is expected to regularly backup items worked on for the church.

Documents, messages and other items, not mentioned above, that need to be retained by GLC should be sent to the Church secretary and/or the Pastor.

GLC Officers are expected to have files that they will pass on to their successor when they complete their term of office. These are exempt from the usual disposition required under this policy. Any remaining items should be handled in accordance with this policy.

A copy of this policy should be provided to all who manage affairs for GLC.

When no GLC Archivist has been appointed, the Pastor is the *de facto* Archivist.

GLC Policy for Records Management*		
Documents	Principal User	Final Disposition
Parish Register	Pastor	Never
Legal and Vital Records	Council Secretary, Church Secretary, Agent, Pastor	Mostly Never
Financial Records	Treasurer, Financial Secretary, Auditors, Endowment Fund members	Some permanent, others as required by the IRS, member records are confidential
Congregation Statistics	Pastor, Church Secretary	Kept 2 years, destroyed as replaced.
Information on Persons	Pastor, Executive Committee, Church Council	Some protected, some destroyed, some after 50 years
Pastoral Care Files	Pastor	Determined by the Pastor
Correspondence	Pastor, Church Council, Council Secretary	Some need to be retained
Programmatic Material	Pastor, Church Council, Teachers, Selected Members	Items related to life of parish should be saved.
Sermons	Pastor	Pastor's records
Resource Material	Pastor, Church Council	Retain samples, dispose of rest.

*See ELCA Reference A link below for a detailed description of "Documents" and "Final Disposition." Additional guidance is provided in ELCA Reference B and C links.

ELCA References:

A: [Congregation Records Retention Schedule](#)

Records Retention Schedule for Congregations of the Evangelical Lutheran Church in America.

B: [Archiving in Congregations](#)

The Work of a Congregational Archivist and/or Archives Committee.

C: [Brief Guide for Archives of Congregations](#)

Approved by Executive Committee: September, 9, 2020