

Local Church Record Schedule

Record Series Title	Description	Total	Current	Archives
Accident and Injuries Records	Workers Compensation Claims Records	Settled + 6	Active	NO
Accounts Payable Records	Claims and Disbursement Records, Expenses, Accounting, Bookkeeping, Paid Invoices, Finance, Purchasing	7	2	NO
Accounts Receivable Records	Membership contributions, offering records	7	2	NO
Administrative Reports	Charge Conference reports, Administrative Board reports, Council on Ministries report, or Administrative Council reports	Permanent	2	YES
Annual Fiscal Reports	Closing of the Books Records, Financial Reports, Balance Reconciliation Records, State Accounts Reports	Permanent	4	YES
Architectural Drawings, Blueprints, Maps		Permanent		YES
Audit Records		Permanent	4	YES
Bank Deposit Books		7	2	NO
Bank Deposit Slips		3	3	NO
Bank Statements		7	3	NO
Benefits Policies and Procedures Records		Permanent	Active	YES
Bequest and Estate papers	wills, gift agreements, bequests	Permanent		As Necessary
Budget Records	Annual Budget	Permanent	4	YES
Bulletins	Sunday worship bulletins, special local church occasion bulletins	Permanent	2	YES
Bylaws		Permanent	Active	YES
Cancelled checks	Cashed Checks	7	1	NO
Certificates of Deposit, Cancelled		3	3	NO
Committee Records	Local church committee records	Permanent	4	YES
Contracts	repairs, maintenance, lease agreements, loans	4 - service contracts; 6 - Repairs, Lease, Loans; Permanent - new construction	4	NO - except for those going to Archives
Correspondence - subject	Correspondence on special or topic interest	Permanent	Active	YES
Correspondence - transitory	Routine correspondence	1	1	NO
Deduction Authorization Records	Deductions input list	Active + 4	Active	NO
Deeds	Deeds, Conveyances, Covenants, easements	Permanent		As Necessary
Directories		Permanent	Current	YES

This information is taken from the 2005-2008 Edition of *Guidelines for Managing Records of the Local Church* by GCAH - The General Commission on Archives and History The United Methodist Church

Record Series Title	Description	Total	Current	Archives
Employment Eligibility Verification Forms		Active + 1 (3 yrs minimum)	Active	NO
Employment Policies and Procedures Records	Employment Policies	Permanent	Active	YES
Greivance Records		Active + 3	Active	NO
Insurance Policies		Permanent	Active	YES
Insurance Election Records, Employees		Employment + 6	Active	NO
Inventories of Property & Equipment		Until superseded	Active	Transfer to Archives for Review
Invoices		7 (except for major construction)	3	NO (transfer major construction series to Archives)
Membership records	Membership register, baptisms, marriages, transfers	Permanent		YES
Newsletters	Church newsletters, UMW, UMM, UMYF and other group's newsletters	Permanent	2	YES
Pay Authorization Records		5	2	NO
Personnel Records	Personel Files	Active + 7	Active	NO
Property Files	deeds, title papers, repair history, permits, lease agreement	Permanent		As Necessary
Purchase Orders		7	3	NO
Real Estate Surveys	surveys, plot plans & related correspondence	Permanent		As Necessary
Rejected Applications	Rejected and Incomplete Employment Applications	2	1	NO
Search Records - accepted		Active + 7	Active	NO
Search Records - all others		5	1	NO
Shipping and Freight Records		3	3	NO
Staff Meeting Records		Permanent	4	YES
Tax-Exempt Certificates	Certificates and Form 990	Permanent		As Necessary
Tax Returns		7	5	NO
Tax Withholding Authorization Records		Active + 5	Active	NO
Time Sheets		3	3	NO
Travel Records		5	1	NO

If you'd like to see a complete copy of this manual go to www.gcah.org. If you don't have access to the internet, call Jan at 405-530-2064.

This information is taken from the 2005-2008 Edition of *Guidelines for Managing Records of the Local Church* by GCAH - The General Commission on Archives and History The United Methodist Church