



Financial Records Management for Congregations

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Your records have a life cycle!

You create and maintain the records of your congregation in order to have the information you need when you need it; in the format from which you can most easily retrieve it; and in such a way that partners working in your congregation, today and in the future, can readily find the information. As you set about preserving information for future reference, plan for the entire life cycle of the records you are creating. If you do this, you should never need to spend time going through old material to determine the potential administrative or historical value.

Today, most of the records of your life together as a congregation begin as digital files. Your financial records and parish register may be kept in a database. Minutes, reports, newsletters, sermons, and other documents are created using word processing software. Correspondence is usually by e-mail. Much of the information you use and distribute to parishioners is created in formats to be read by a Web browser. Even the photographs of your congregation's activities are now in digital formats. These guidelines will address the ways in which you can assure future generations that these records will still be available for their use long after hardware, software, and file formats have changed.

Consistency is important in the care of records. Any records retention policy has validity, once accepted as the policy of the organization, only as it is uniformly practiced. It should be neither selectively implemented nor disregarded at the whim of the custodians of the records. Never purge records in the face of potential litigation. Information that is retained in hard copy or in electronic files is the property of the congregation. Such information is not the property of the pastor or of officers of the congregation to be removed, retained personally, or destroyed at will. All staff members are custodians of the records they maintain.

- For a description of records and their care, see the [Records Retention Schedule for Congregations](#)
- Click here for information on [Maintaining the Parish Register](#).
- For teaching purposes, a PowerPoint Presentation based on this manual is available [here](#). With questions, contact the Archives of the ELCA at Archives@ELCA.org.

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