

Managing Church Records A Guide

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Church Records are Important

The records of the developments and decisions of your church, whether in traditional paper form or electronic, are important sources of information about its life. These records can include minutes of meetings, membership rolls, newsletters, annual reports, programs, etc, as well as photographs and recordings.

These records are important now and in the future – for example, they will be needed by church officers who are responsible for planning and decision making in your church and denomination. Researchers from historical societies, students and the community will also find them useful in analysing the story of your church and district. These records may also be needed by the church for legal reasons and could help to protect the church and its members in cases of litigation. So it is vital that these records be properly made in the first place, then carefully stored and well managed. Here are some guidelines to help in the process.

Creating good records

It is important to make sure that all departments **create adequate records** of their work either on paper or electronically, or both. Make sure such records are clearly identified as to who originated them, their purpose and especially their date. Keep in mind the possible future uses of the records (planning and review, denominational reporting, historical research and legal responsibilities), and ensure that official records of decisions, reports of developments and other relevant details are formally made. Records should be on good quality paper, with the pages bound together firmly and/or pasted in strong books. It is not acceptable to use arch-binders, metal paper-clips and sticky tape which damage the documents.

If you do not have high level IT support, electronic records (such as word processing documents, spreadsheets, emails etc) should be printed out in hard copy which are then handled in the same way as traditional records. If you have good IT support, then the electronic records should be created in standard file format (so they can be easily read now and in the future), tagged with good descriptors, saved to permanent storage (tape, DVD etc) and stored in optimum conditions where they are can be available in perpetuity. They need to be checked regularly and migrated to new media and formats from time to time so that they continue to be accessible. There needs to be a simple but effective system of identifying and accessing electronic records in the same way as for paper records.

Important note: if you cannot guarantee that you will be able to maintain an electronic record system **permanently into the future**, then do not switch to a an electronic only record system. Instead, print out your key records and keep them in the paper environment. If you start on an electronic system and cannot maintain it for ever, your records will be lost!

(See also our Guides on digital archiving and digitisation of records.)

Assign the responsibility for caring for the records so created to some specific person in the church. This should be linked to an official position so it can be supervised by the church in its regular administration. It can be part of the work of the church secretary or administrator; however, ideally, a post of Church Archivist should be created. Be sure that all departments of the church are included in the process, and that those in charge know their responsibility, and act upon it.

Setting up the system

The person/s responsible for church records should be given full **authority** to carry out the job together with the necessary **equipment, materials and supplies** and a clear statement of **responsibilities**. There also should be an adequate **financial** allocation to provide any necessary items such as computer equipment and services, storage media, boxes and materials. There should be **secure space** made available in the church building together with filing cabinets and shelving; similarly space on the computer server and other long term storage areas should be available for digital records, with adequate back up. Develop a proper **accountability process** to ensure the system is working.

Note that church records are not to be stored in anyone's home or business office or on company or personal computers because access is awkward and security is too risky. Paper records that are likely to be consulted only rarely by the church or those that are of particular public interest can be stored at an official or central archival repository such as the State Library, a University or the Baptist Union; make sure you are aware of the terms and conditions on which the material is held and who controls access to it.

Note that it is NOT the policy of the Baptist Union of Queensland to seek the custody of records of all local churches for its Archives, because under the Baptist system, these records are the responsibility in the first place of the local church. However, if churches wish voluntarily to hand these records over for safe keeping, arrangements can be made, and the records become the property of the Baptist Union. The Baptist Church Archives is also able to accept records that are vulnerable. The records of churches that cease to operate revert to the Baptist Union and should be sent to the Baptist Union immediately upon closure.

Caring for the Records

For paper records, the main **physical dangers** are dust, heat and fire, damp and humidity, light, mould, insects and vermin, mechanical damage and pollution (especially the acid content of paper, containers and the environment). So store material in secure,

cool, dry, airy, fire-proof conditions on steel shelving, using strong lidded boxes and strong folders; wooden shelves should only be used if fully treated. Ideally, acid-free paper, interleaving and containers (folders, boxes) should be used; if paper is already deteriorating, have it photocopied or micro-filmed before it is too late. The ideal is a stable 20 degrees Centigrade and 55% relative humidity. Note that untreated wooden shelving is dangerous to paper material because of moisture and chemical fumes.

Avoid **mechanical damage** caused by such over-tight or over-loose packing, crushing of papers due to weight of material stored above, the pressure from heavy minute or financial books, and tearing etc caused by routine or worse, rough, handling etc. Remove pins, clips and staples that may rust, 'scotch' tape and rubber bands that may deteriorate and stain/damage the paper, and unfold all papers; remove from mechanical binders and place material in suitable identified envelopes or folders instead.

Use **filing cabinets and stationery cabinets** which can be locked for security. Open steel shelving (even compactus) can be used for large collections but they must be housed in a secure area. Arrange material in logical categories on shelves with space for expansion, with folders, boxes and other containers labelled on the outside and an index to keep track of them all. Alternatively, for boxes on shelves, number them sequentially and list the number with the item in the catalogue. Make different arrangements for large and awkwardly shaped items.

Electronic records are similarly open to many problems which are likely to destroy them and their value. These include lack of tagging; failure to select, save and store records in an systematic manner or to use standard file formats; deterioration of media; obsolescence of hardware and software; failure to migrate to current media and software etc. It therefore requires sophisticated IT support when relying exclusively on digital archiving.

Sorting, identifying and indexing

All existing paper material should be carefully **sorted and labelled**; a list (in triplicate - one copy housed with the material, another in the church's administrative centre and a third to the Baptist Church Archives) should be compiled indicating: (i) originating body and officer, (ii) date, (iii) type and (iv) number of items. (E.g., Women's Union - secretary's correspondence, 1980-90 - 3 folders) (Baptist Heritage Queensland has published a *Church Archives Register* to facilitate this process.) Never sort material according to theme like in a library, but always leave it arranged according to the groups and sequences in which was originated. That is, archival practice respects the original provenance and order of documents, which is different from normal office procedures and library practice.

Loose papers such as correspondence or reports should be bound firmly together according to originating office and chronological order and clearly labelled. Use strong envelopes, manila folders, archival and archival boxes for storage.

Electronic records should be carefully tagged with identification data, and stored systematically with adequate paper indexes or catalogues to enable easy and comprehensive access to the records. The media should be stored in optimum conditions for long term survival. Care needs to be taken to ensure that the authenticity of material is preserved and that there is no confusion when multiple copies are involved.

Physical photographs and audio/video recordings should be as fully identified as possible, stating date, place, occasion, participants, and placed in acid-free boxes and envelopes. (Do not use "magic" photo albums which destroy photos.) Paste **newspaper cuttings** into scrapbooks with full identification (date, paper, subject matter). As **colour photos** are likely to deteriorate after a few years, print all important photos in black and white, and keep the negatives with the prints as well.

Digital photographs and recordings should be included in the archiving protocols for other digital records.

What and how to collect

Clear **policies and procedures** should be set up to **acquire new material** on a regular basis (say, at the end of each church year) and to collect extra material (e.g., from leading church families) as it becomes available. You should aim to collect all the basic records of the church, including minutes, rolls & reports of all organizations, substantial correspondence, financial & general reports, publications, samples of promotional material, newspaper clippings, photographs, audio and video recordings of important events. (Memos, agendas, day-to-day financial documents and similar short-term material are not needed.) Newly accessioned material, whether paper or electronic, should be sorted, labelled & listed as above, and the full listing updated. (See also our guide sheet on What to Collect)

Be sure to **clarify conditions of ownership, access and publication**. Any material acquired by the church from private individuals, families and other outside bodies should be owned by the church archives and be unencumbered - ie, no restrictions on its use and the archivist can make it available to clients on the normal basis (an exception may be made for sensitive, very recent and fragile material). Privacy considerations should be thoroughly clarified.

Using the material

Establish **policies and procedures for use of the material** by bona fide church officials, members and researchers, with due regard for privacy considerations. Keep records of date and material used and the user *including* members and officers of the church. Clients should be required to apply in writing for permission to use material in published form, and should formally acknowledge the source of any material used. Physical access will be determined by local conditions.

Make use of the material in creative and helpful ways, such as displays, open days, access by local historical groups and students, web-sites, and the publication of a local church history. See the guide *Your Local Church History* published by the Baptist Heritage Qld. for further information.