



Published on *Presbyterian Historical Society* (<https://www.history.pcusa.org>)

Records of Congregations

The Presbyterian Historical Society supports the record-keeping activities of all entities of the Church. For congregations, we carry out that mission by digitizing records; storing records of permanent value [1]; and providing advice on records retention, storage, and preservation.



RECORDS DIGITIZATION [2]

We digitize original records and microfilm for PC(USA) congregations at a subsidized rate.

digitization [2]

RECORDS DEPOSIT [3]

We hold original records of permanent value on deposit in an environmentally controlled archival storage area with specialized fire detection and security systems. Congregations can deposit records

at no charge. You retain ownership of the records and may request their return at any time with written authorization from the clerk of session.

Records Deposit [1]

ADVICE ON RECORDS MANAGEMENT

The Presbyterian Historical Society provides advice to congregations on records management but does not hold congregation records of temporary value. Our general retention schedule for congregations follows below. Retention requirements for financial and administrative records vary from state to state. For further assistance, congregations should consult Records Archivist David Staniunas [4], an accountant, or legal counsel.

RETENTION SCHEDULE FOR CONGREGATIONS

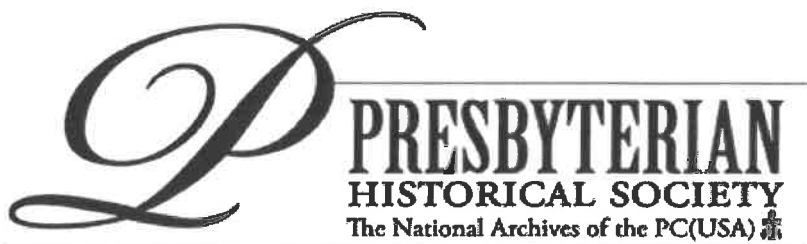
Types	Retention Period
Minutes	permanent
Registers	permanent
Annual reports	permanent
Bylaws/charters	permanent
Incorporation records	permanent
Annual budgets	permanent
Annual audits	permanent
Annual financial statements	permanent
Subject files: correspondence, minutes, or other records surrounding subject matter of continuing administrative or legal value, or comprising information on the mission, vision, and actions of the congregation	permanent
Manuals/handbooks	permanent
Newspapers/newsletters	permanent
Brochures/promotional material (1 copy)	permanent
Photographs	permanent
Architectural drawings, plats, plans, blueprints	permanent
Wills, bequests	permanent
Legal/judicial case records	permanent

Loan agreements	satisfaction + 20 years
Property appraisals, records of sale	20 years after sale
Personnel records/employee records	employment + 7 years
Contracts	active + 6 years
Accounts payable	7 years
Accounts payable invoices	7 years
Accounts receivable records	7 years
Bank statements	7 years
Canceled checks	7 years
Cash receipt records	7 years
Donations (regular, weekly)	7 years
Expense reports	7 years
FICA / W2 records	7 years
Payroll records	7 years
Petty cash records	7 years
Receipts of purchases	7 years
Bank deposit slips	3 years
General/routine correspondence (acknowledgments, requests, travel arrangements, etc.)	3 years
Travel plans/arrangements	3 years
Periodic financial statements	2 years
Data for updating mailing lists	1 year
Invitations	1 year
Meeting notices	1 year
Mailing lists	active
Reference/resource materials	active

Source URL: <https://www.history.pcusa.org/services/records-management/records-congregations>

Links:

- [1] <https://www.history.pcusa.org/services/records-management/records-congregations/records-deposit>
- [2] <https://www.history.pcusa.org/services/preservation/digitization>
- [3] <https://www.history.pcusa.org/records-deposit>
- [4] <mailto:dstaniunas@history.pcusa.org?subject=Records%20of%20congregations>



Published on *Presbyterian Historical Society* (<https://www.history.pcusa.org>)

Records Deposit

The society accepts original records of permanent value and certain types of temporary records on deposit. PC(USA) congregations, mid councils, and national agencies are encouraged to deposit their records at no charge in our secure, climate-controlled archives.



Records we accept

Session minutes and registers are of chief importance, but we also hold minutes of other church councils, including deacons, trustees, women’s associations and youth groups. Records are housed in an environmentally controlled archival storage area with specialized fire

detection and security systems. Congregations retain ownership of the records on deposit and may request the return of records at any time with written authorization from the clerk of session.

Shipping records

Before packing and shipping records to us, please consult your retention schedule, or contact the society [1] to make sure you are shipping only records of permanent value.

Create a signed cover letter and an inventory to include with the shipment. If feasible, describe the contents of a shipment item by item, for example:

- First Presbyterian Church (Truth or Consequences, N.M.):
- Session minutes, 1906-1936.
- Session minutes, 1936-1948.
- Register, 1906-1948.
- Trustees minutes, 1900-1910.

We recommend shipping records in as near their original state as possible. Do not cut the text block out of bound volumes. Do not remove bindings. Pack the materials in a sturdy, corrugated cardboard box, densely enough that volumes are unlikely to shift, insulated from the edges of the box with bubble wrap or wadded packing paper.

Our preferred carrier is United Parcel Service (UPS). Ship records via ground delivery to:

Records Archivist
Presbyterian Historical Society
425 Lombard St.
Philadelphia PA, 19147

Source URL: <https://www.history.pcusa.org/services/records-management/records-congregations/records-deposit>

Links:

[1] <mailto:dstaniunas@history.pcusa.org?subject=Records%20Deposit>