



## Records Management in Local UMC Churches

### When to Send Records to the Archives

¶ 25494. All the deeds, records, and other official and legal papers, including the contents of the cornerstone, of a church that is so declared to be abandoned or otherwise discontinued shall be collected by the district superintendent in whose district said church was located and shall be deposited for permanent safekeeping with the commission on archives and history of the annual conference.



To send records, please contact our Archivist and Preservation Librarian, Kara Jackman at [kjackman@bu.edu](mailto:kjackman@bu.edu) or 617-353-1523.

### Records to the Archives...

- ◆ Should be either the **Official Church copy** (Treasurer’s Office, Sub-Committee Chair, Sewing Circle Chair, etc.) or the **Church Office copy** only.
- ◆ Copies of records held by other offices are considered duplicates and can be thrown away after they have been used by that particular office.

### Remember to Contact the Conference Treasurer!!

#### If your church is closing...

- Some records & financial materials may need to be viewed by the Conference Treasurer before storage at the Archives.
- Please check with the Conference Treasurer office to determine which records they may need. Contact information for the New England Conference Treasurer is listed on: [www.neumc.org/businessadmin](http://www.neumc.org/businessadmin).

### About Our Archives

The School of Theology Archives collects, preserves, and provides access to records of enduring, historical value relating to, or created by, the **New England Conference of the United Methodist Church** and the **Boston University School of Theology**.

The **New England Conference Collections** contain Local Church Records, Conference Records, conference journals and other publications. The **School of Theology Collections** contain records of the administrative offices, organizations and institutes. We also hold **personal papers and artifact collections donated by prominent New England Methodists and School of Theology faculty members**. Records exist in a variety of different formats including documents, photographs, audio and moving image recordings, artworks and artifacts.

### Donations

The Archives accepts donations that relate to the United Methodist Church, and its predecessor denominations, in New England. We also collect personal papers, artifacts, art, and other records that relate to the history of Boston University School of Theology. Other collecting areas include records relating to social justice and religion, art and theology, and Global Missions.



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### Packing Your Records

- ◆ Place records in standard cardboard boxes available at Staples, OfficeMax or local moving company (UHAUL).
- ◆ Box should have a **secure** lid.
- ◆ Reduce use or remove staples, paper clips, metal fasteners and elastic bands.
- ◆ Dust records with duster or new, dry paint brush to remove surface dirt and dust.
- ◆ Place records in folders, then in boxes with secure lid.
- ◆ **Please inventory your boxes!**

### To Inventory Your Boxes:

*On a sheet of paper inside the box:*

- Church Name
- City and State
- Category Name
- Subcategories in box
- Box ## out of ##
- Folder List (optional)

### What to Send:

#### Essential Records

- Membership
- Administrative Reports
- Deeds
- Bequest & Estate Papers
- Official Local Church Histories
- Benefits Policies
- Procedures Records

#### Desirable Records

- Architectural Drawings, Blueprints, & Maps
- Employment Policies & Procedures Records
- Insurance Papers
- Annual Fiscal Reports

#### Useful Administrative Records

- Audit and Budget Records
- Bylaws
- Committee Records
- Contracts
- Property Files
- Real Estate Surveys
- Staff Meeting Records
- Tax-Exempt Records

#### Useful Historical Records

- Special Correspondence
- Bulletins (Special Worship Services)
- Special Newsletters
- Directories
- Scrapbooks, Photographs, Audio/Video
- Special Artifacts

### Please Do Not Send:

#### Financial Records

- Bills
- Receipts
- Cancelled checks
- Checks that were not used
- Any ledgers with documentation of accounts payable/receivable that are not dated
- Invoices
- Bank statements
- Bank books

#### Things That Are Not Records:

- Books
- Journals/Magazines/News Papers
- Books, journal articles, and news articles interpreting past events.

*Books like bibles and hymnals should only be saved if they have unique historical significance.*