# ARCHIVE CHECKLIST FOR CONGREGATIONS

*Questions? Contact Whitney Robinson (archives@episwtn.org)*

Congregation Name, Location:

## PERMANENT ARCHIVES

*Retention period: Permanent*

### Legal & Organizational Documents

- ☐ Articles of Incorporation
- ☐ By-laws
- ☐ IRS Tax Exemption Documents
- ☐ Property and Asset Records
- ☐ Deeds and Mortgages
- ☐ Vehicle Titles

### Church Registers & Historical Records

- ☐ Vital Records Registers (baptisms, confirmations, marriages, and burials)
- ☐ Service Registers (records of worship services)
- ☐ Cemetery or Columbarium Records
    - ☐ Receipts for purchased plots or niches
    - ☐ Maps showing purchased and available plots or niches
- ☐ Records of Memorial Gifts (especially specific items given in memory or honor of someone)
- ☐ Architectural Plans

### Congregational Governance & Ministry

- ☐ Annual Meeting Reports from Congregational Ministries and Groups
- ☐ Parochial Reports
- ☐ Vestry Minutes

# FINANCIAL RECORDS

*Retention period: Keep the last 7 years of records.*

## Financial Documentation

- ☐ General Ledgers of Accounts
- ☐ Bank Statements
- ☐ Canceled Checks
- ☐ Deposit Slips
- ☐ Vendor Invoices
- ☐ Expense Receipts
- ☐ Audit Reports
- ☐ Contribution and Donor Records
- ☐ Employment and Payroll Records

---

# OPTIONAL ITEMS

## What might help tell future generations about your congregation?

- ☐ Bulletins/Newsletters/Programs from pivotal or monumental events in the life of the congregation
- ☐ Photographs (label them!)

## ARCHIVE REVIEW COMPLETION

- ☐ Permanent records have been identified.
- ☐ Financial records for the last seven years have been gathered.
- ☐ Missing records have been noted.
- ☐ Records are properly organized and stored–*digital records should be backed up on paper or in a secondary digital location*

Date Reviewed: _____

Reviewed By: _____