

Service Bulletin

Concordia Historical Institute
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PRESERVATION, FILING, AND MAINTENANCE OF OFFICIAL DOCUMENTS, DEEDS, CHURCH BULLETINS, AND CORRESPONDENCE Aug. R. Suelflow

As a corporation, the congregation becomes involved in the acquisition, maintenance, and care of its legal documents and other papers vital to its ministry and to the safeguarding of its properties. This bulletin presents some guidelines with respect to the preservation, filing, and maintenance of such official/legal documents and other materials and resources of vital concern and interest to the local parish.

I. OBVIOUS MATERIALS TO BE PRESERVED

- A. All materials which answer the "who, what, when, where and (if possible) the why" of the local parish.
- B. The following documents must be preserved:
 1. Copies of all constitutions, past and present, both of the congregation itself and of all its organizations.
 2. Copies of all calls extended to pastors and teachers and other servants of the church, and accepted by them. (Calls which have been declined as well as their "Begleitschreiben" need not be preserved.)
 3. Copies of the deeds and descriptions of the church properties, titles, leases, surveys, etc.
 4. All contracts for the construction of congregational buildings, and facilities, as well as contracts negotiating for special services. All plans, blueprints, specifications, drawings, etc., shall be included.
 5. Mortgages should be retained even after they have been retired. It is poor policy to burn them.
 6. Articles of Incorporation and amendments thereto.
 7. The list of charter members.
 8. Copies of all transfers and cases of excommunication and discipline shall be permanently preserved.
 9. An annual list of all names of officers, boards and commissions.
- C. Other records, often overlooked, which also must be preserved and filed systematically include:
 1. The records of the official acts, especially for baptism, confirmation, marriage, burial, accessions and releases;
 2. The minutes of the voters' meetings, church council, building committee and some other important committees, with the exception of the records currently in use, which must remain in the possession of the respective secretaries;
 3. All official correspondence;
 4. Copies of reports of all the congregation's official committees and commissions, as well as its societies and auxiliary organizations.

5. The non-current treasurer's records, including the monthly and annual reports;
6. The Sunday bulletins, congregational newsletters, special congregational letters issued to the membership, orders of service and programs for special events;
7. A history of the congregation;
8. A chronological, running account of the major events and activities in the congregation;
9. Statistical and comparative account of the major events and activities of the congregation;
10. The educational institutional records including parish, weekday and Sunday School, and special areas such as records of teachers, enrollment, policies, terms, textbooks, curricular offerings, tuition, special problems, confirmations, etc.;
11. Photographs of churches, schools, pastors, teachers and other personnel and organizations. (Be sure to identify them by name, occasion, date and place.)
12. Museum pieces indicating a way of life, tape recordings of special services and events and other oral and visual resources;
13. Foreign language materials, which ought to be translated into English. (See CHI Service Bulletin #10)

II. HOW SHOULD THESE ITEMS BE PRESERVED?

- A. A fireproof filing cabinet, equipped with a lock, stored in an area which is least affected by heat, extremely dry temperatures, or high humidity and temperature fluctuations, should be provided. All of the above named items, including also the ledgers for the official acts, shall be filed in such a cabinet or room.
- B. The minutes of official meetings of various types are best transcribed in legible hand on a permanent ledger. However, if they are typewritten in loose-leaf form, and several copies have been made, the original ought to be permanently bound at regular intervals of five to ten years. Whether bound or in a permanent ledger, an index ought to be prepared for the period and included in the same binding. This binding could also include a complete list of officers and full-time personnel serving the congregation during the period included in the binding, together with a brief resume of the congregation's history or references to its major events. In addition, any external events and relationships which have affected the congregation should also be recorded. Administrative policies and resolutions would also be most helpful.

The index should particularly take cognizance of personnel, administration and policy resolution, as well as building and physical property decisions, worship resolutions, etc. Each bound volume should be micro-filmed. (See CHI Service Bulletin series #19)
- C. The ledgers containing the official acts shall be adequately identified on the spine and cover, numbering the books in numerical order and including the dates covered. These ought to be microfilmed when new ledgers are begun, or at anniversary years. Copies of the microfilm should be stored elsewhere, for example, at the Concordia Historical Institute.
- D. As certain collections build up, such as Sunday bulletins (which ought to be retained in two sets) and other congregational serials, these ought to be bound in permanent form, adequately identified with a permanent inscription on the spine.
- E. The calls extended and accepted together with the "Begleitschreiben" of those calls accepted, shall be filed in folders in chronological order by the archivist, who shall attach any additional information which may be necessary for understanding of the local circumstances, comments, salary matters, etc.

- F. Blueprints and any oversized documents shall be filed in either large rolls with internal support, adequately identified, or in a separate blueprint file. Under no conditions should they be folded to fit into a letter size filing cabinet. Any additional information needed to understand these blueprints, drawings, plans and specifications should be added by the archivist.
- G. All official correspondence shall be filed in acid-free folders. An alphabetical arrangement under normal conditions may be best. Care should be taken that this correspondence is filed by corporate entities, rather than by the individual who represents a corporation. As such correspondence builds up, only the corporation will continue to be relevant, not the individual. Further, it is desirable to designate correspondence which has permanent value and is thus slated for permanent retention in contrast to correspondence which has only ephemeral value. At certain intervals, a quick separation between the two types can be made, and the ephemeral correspondence destroyed. After the file folders consume too much space in a file, portions of the older correspondence may be stored in Hollinger archives boxes and places on open steel shelves. This certainly is considerably cheaper than purchasing additional filing cabinets. In addition, this transformation also insures utilizing the filing cabinets for current records only.
- H. All records shall be placed on a retention and destruction schedule. It has been estimated that more than half of all contemporary records can ultimately be destroyed because they have no historical-legal value. (See guidelines for destruction and retention schedules, Bulletin #2C)
- I. Records shall be periodically inspected for atmospheric and vermin damage. Adequate safeguards and protective measures should be taken.
- J. When repair or restoration is planned for documents, special care and consideration ought to be given to those procedures which have proven to be most satisfactory. Fumigation sometimes may be necessary. Materials should never be folded, but should always be flattened out. Care must be taken with old or brittle paper which was folded long ago; it will probably have to be humidified before unfolding is attempted.
- K. Microfilm copies of the voter's minutes, official acts ledgers, and other vital records should be prepared with the original negative and positive print sent to the Synodical archives, the congregation retaining a positive for local use. This is for the congregation's own protection in case fire or some natural disaster should destroy the originals.
- L. Under normal conditions, vital records as those outlined above, should never be permitted to be removed from the church premises. In certain cases, however, it may be more desirable for the local parish to store its vital records in the vault of a local bank. Generally speaking, when congregations can install a vault with proper atmospheric controls, it is considered superior to file all the resources of the congregation referred to in this bulletin in Hollinger Archives boxes on open steel shelves in such a vault.

III. COOPERATION WITH DISTRICT AND SYNODICAL DEPOSITORIES

- A. In order to have the congregational archivist function and serve effectively, and to establish a vital link between congregation, district, and Synod, the congregational archivist should remain in constant touch with both the district and synod archives. He should transmit the congregational resources in duplicate to both the district archives (see LUTHERAN ANNUAL for the addresses) and to the:

Concordia Historical Institute
Department of Archives and History
Lutheran Church--Missouri Synod
801 DeMun Avenue
St. Louis, MO 63105-3199

- B. Among the items to be transmitted to both the district and Synodical Archives are:
 - 1. Printed or manuscript histories of congregations;
 - 2. Special orders of service from ordinations, installations, burials, groundbreakings, dedications, rededications, anniversaries, etc.

3. Special bulletins or newsletters containing recent historical tidbits on the congregation. (The Synodical Archives cannot maintain sets of Sunday bulletins.)
 4. Biographical material pertaining to pastors, teachers, lay leaders and their families. Genealogies are also welcome. The form, whether printed or manuscript is immaterial.
 5. Local or regional Lutheran periodicals and serials;
 6. Photographs of churches, schools, pastors, and teachers. Please identify the persons, dates, and locations. For archival purposes, black and white photos are far superior to color.
 7. Museum objects, recordings of special services and events and similar audio and visual resources of district and synodical interest. (See our Bulletin #8)
- C. Your state, county and local historical societies are also interested in obtaining printed congregational histories.

IV. USING THE ARCHIVES

- A. Anyone with a legitimate purpose should be permitted to use the archives. Some records, however, should be restricted. For example, records of a church discipline case should not be published or handled except by a very few people like the pastor and the elders.
- B. When records are searched, the person doing so should use the documents in the same room or nearby, copying what information is needed but not removing the file or document. After use, the records should be immediately refiled, using care not to cause any damage.
- C. The Records Committee of the congregation should establish the policies for access to materials.

For further information on the procedures mentioned in this bulletin, or for copies of the other bulletins referred to here, write to:

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801 DeMun Avenue
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