

Item 03-10 (On Maintenance and Reporting for Session Membership Rolls and Registers).

The 217th GA instructs the Stated Clerk to develop a process that will consider the feasibility of and standards for the alternate maintenance and reporting by a session of its membership rolls and registers.

Per the Book of Order, clerks are required to create and maintain permanently minutes and a variety of rolls and registers.

There are no requirements surrounding how these documents are created or in what medium. Creating and maintaining an access copy of these records in electronic format is totally acceptable.

However, the official copy of any record identified as permanent needs to be maintained in a permanent and unchangeable medium. Currently, there is no permanent electronic medium. Permanent records should be printed on acid-free paper using a permanent printer or photocopier using fusion technology (i.e., a laser printer or photocopier) or migrated to archival quality microfilm per ANSI-AIIM standards. (Inkjet printing is not adequately durable for archival purposes.) Moving the official/record copy of minutes and rolls to one of these media will ensure their preservation.

Churches have never been required to maintain session minutes and rolls and registers in the expensive maroon leather binders with oversized pages and square holes. Fewer congregations are using the traditional red books, but some still choose to do so.

What many congregations are now using is 8.5 x 11 acid-free paper for printing minutes (see www.history.pcusa.org for acid-free requirements and suppliers). The minutes are maintained in an appropriately-distinguished binder, folder, or box, which is carefully stored, preferably in a secure, fireproof location. The pages are numbered, with blank pages marked (ordinarily accomplished by drawing a diagonal line across any open space on a page before the beginning of the next pages in the minute book) so that additional material will not be inappropriately inserted after the minutes are approved. The approved copy of the minutes becomes the official/record copy.

Information contained in the rolls-and-registers volumes is now maintained either in the old binder format or "live" in electronic computer files, and electronic registers must be preserved in the same way that minutes are. Depending on the amount of activity, clerks should print out on acid-free paper a snapshot of the register every six months or annually.

In no case should minutes or records exist only in electronic form after approval.

The OGA does not recommend any specific recordkeeping software but suggests that churches choose one of the leading, all-purpose database programs such as Access, Excel, or FileMaker Pro rather than a database marketed specifically for church use. The small companies that sell church databases often have a very short lifespan, and these companies generally do not provide the quality of customer support available from larger companies. With technology changing so rapidly, it is important to consider not only how the specific database program works but also whether the electronic data will be accessible ten years from now. If a church is using a Windows office suite, the congregation may already have access to a database program that will serve recordkeeping needs.

There are a number of useful documents available from the Presbyterian Historical Society/Department of History of the Office of the General Assembly at <http://www.history.pcusa.org/>. The department's staff provides records management, archival, and information services to the denomination with a staff of archivists who are trained and current in these fields. Their recommendations for management and preservation of records will evolve as technology changes.

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