



## Maintaining a Legacy: Archival Transfers for Closing Congregations

When a Community of Faith has determined that it is no longer possible to continue operating, it is an immense loss to its members, the United Church, and the broader community. An issue often faced by the members of a closing congregation is “What do we do with all of our stuff?” This sheet is meant to provide guidance for those facing this dilemma, specifically for those whose congregations are **closing** or **amalgamating with another congregation**.

Please read the guide below if your congregation is closing/amalgamating, as well as the special considerations depending on your situation. If you have any questions throughout the process, please contact the Archives for assistance.

### Establish an Archives Committee

Form a group of congregation members to determine which records should be sent to the archives. This is best done before the congregation closes or amalgamates. This group will work with the minister or administrative assistant to ensure all relevant records are gathered, and will coordinate the transfer of the records to the archives. This group should contact their regional council office early in the process to seek input and guidance on records transfers.

### Compile and Assess the Congregation’s Records

Work with your church administration to collect all records to be considered for transfer to the archives. **Please consult the listing at the end of this handout for a more detailed listing of records to be sent to the archives.** This listing should inform your decisions.

### Managing Electronic Records

Determine whether there are any electronic records that need to be transferred to the archives as well. If a record exists both digitally and physically (e.g., minutes which have been printed), please only send the physical copy. Records in a Church Management Software may need to be exported from the software for transfer to the archives. **If there are electronic records to be sent to the archives, please contact us immediately.**

### Prepare Records for Transfer

Once you have determined which records are to be transferred, please package the records into banker boxes. Create a listing of the materials in each box. This listing should be printed out and placed on top of the materials, within the box. Print out and complete the *Communities of Faith Transfer Form*. Please enclose a completed form in each box being sent to the archives. **Note: please place mouldy materials in a closed bag within a banker box, and inform the archives of their existence prior to transfer.**

### Contact the Archives

Prior to sending records, please contact the archives at [archives@united-church.ca](mailto:archives@united-church.ca). In your email, please include the name of the congregation, inform us that you are closing/amalgamating and the date this is occurring (if possible), and attach a copy of the box listing, so we can verify that the appropriate records are being sent. **Please do not send materials to the archives without contacting us.**

## Transfer the Records

Once you have received confirmation from the archives, please arrange for the records to be transferred. This can be done by either a member of the congregation, or through the use of a courier service (Purolator, UPS, FedEx) to pick up and deliver records.

### **Special Considerations for Amalgamating Congregations**

If your congregation is amalgamating with another, there are some additional factors to consider:

- 1) You may wish to send historic/membership rolls to the new congregation, so that the names of congregants can be transferred to a new historic roll. Once this is complete, the old historic roll should be transferred to the archives as soon as possible.
- 2) Financial records from the closing congregation which are not yet 7 years old should be sent to the new congregation until they fulfill this retention period. Once retention has been met, the archives should be contacted to discuss whether these records should be transferred or disposed of.
- 3) The archives should be advised of the amalgamation, and provided with the contact information for the new congregation.
- 4) For the congregation that is remaining open, it is highly encouraged to conduct a transfer to the archives as well. This will provide more space for your growing congregation!

### **Special Considerations for Closing Congregations**

When your congregation is closing altogether, and is not amalgamating with another, there are some additional factors to consider:

- 1) Financial records which are not yet 7 years old must be kept until they have fulfilled their retention requirements. Practices vary across regional councils, so please contact your regional council office to determine next steps.
- 2) The archives should be informed of the closure, and be provided with the contact information for the trustee responsible for the transfer of records, and confirmation that a plan has been established to maintain these financial records.

Below are some guidelines for what should and should not be transferred to the Archives.

## Determining What the Archives Wants

Adapted from "What do the archives want?" by The United Church of Canada Archives Circle

### What records should be transferred to the Archives?

- ✓ Baptismal, marriage, and burial registers
- ✓ Historic rolls and communion rolls and registers
- ✓ Official minutes and correspondence of church courts and annual congregational meetings
- ✓ Board and committee manuals and organizational charts
- ✓ Official minutes, correspondence, and reports of standing, sub-, and ad hoc committees
- ✓ Property records, including plans, deeds, titles, leases, mortgages, bills of sale, and construction and maintenance contracts and invoices
- ✓ Records and correspondence of all groups and associations, including:
  - women's groups (Ladies' Aid Society, Woman's Missionary Society, Woman's Association, and United Church Women)
  - men's groups (AOTS, Men's Club)
  - Sunday schools, youth groups
  - choirs, mission bands, Bible classes, etc.
- ✓ Correspondence files
- ✓ Special church bulletins (i.e., anniversaries and dedications). 4 bulletins per year, to a maximum of 40 per decade
- ✓ Sample of church newsletters
- ✓ Annual reports and audited financial records
- ✓ Clearly identified and dated photographs of personnel, executive, boards, buildings, properties, and special events

### What records should NOT be transferred?

- ✗ Duplicate congregational materials (photocopies of minutes)
- ✗ Records created by Regional Councils, or national office (i.e., photocopies of Regional Council minutes)
- ✗ Invoices, receipts, or cancelled cheques
- ✗ National church publications are rarely kept. Please provide a listing of any in your church, which we will compare against our holdings
- ✗ Pulpit or family Bibles unless they contain important historic information not obtainable elsewhere
- ✗ Plaques, trophies, or other artifacts should NOT be brought to the archive. For unique artifacts please contact the archive to discuss the best method of preserving the record.

### What about scrapbooks and photo albums?

- Scrapbooks can hold interesting collections of memorabilia, but it takes careful planning and investment in proper materials to ensure such collections are long-lasting. Many of the materials used in scrapbooks deteriorate over time. If it is necessary to prepare a scrapbook, use acid-free paper and archival adhesive.
- Photo albums face the same preservation considerations, so use archival materials. It is best to choose clearly identifiable images to send to the Archives. Make sure photographs include names, dates, and locations.

For detailed records retention schedules, please review the [Sample Records Schedule: Congregations](#)

A network of United Church Archives exists across the country to preserve the archival records of all courts of the United Church, including the records of congregations.

Congregational records should be routinely transferred to the appropriate Regional Council Archives for permanent preservation. However, before preparing to transfer your records, you may be wondering: *Why should* these records be sent to the Archives?

### ***The Manual and Archives***

Section A.5 of *The Manual, 2022*, clearly identifies the need to archive church records:

- Church records “have historical and legal value.”
- Church bodies are responsible for “making sure the records and accurate and complete” and “keeping the records safe, secure and under their control.”
- Church records are the property of The United Church of Canada; “they may not be taken or kept by any member, minister, or other person.”

Because church records are the property of the United Church, all inactive records should be centralized in an archival repository and not scattered among various local archives, libraries, and research centres.

To accommodate the geographical size of the country, each Regional Council has its own Archives (the Ontario Regional Councils share the same facility with the General Council Archives) to house the archival records of Regional Councils and communities of faith.

### **The advantages of sending your records to your Regional Council Archives are many**

- Staff are trained and follow professional archival standards to acquire, arrange, describe, preserve, and make material available to researchers.
- The Archives are secure, environmentally controlled spaces suited to storing archival material.
- Records are placed in acid-free folders and boxes for further protection.
- Outdated records stored in churches are susceptible to fire, water, damage, mould, silverfish, being misplaced or stolen, etc.
- Records are made more accessible to potentially more researchers.
- Church records serve as a source of information for church histories and celebrations, community histories, and genealogical research.
- Records are our memory, not only of facts or evidence of activities and decisions but also of our collective story as a church.

“The Archives belongs not to me, not to the church.... It is the corporate memory of our life with God, in all its beauty and tragedy and wonder.”  
Bob Stewart, Past Archivist, BC Conference

For more information, contact your [Regional Council Archives](#)