Clerk's Gathering & Records Review 2015

NOT UPDATED: see newer resources such as
http://www.ctcumc.org/files/fileshare/digital+records+-+gcah.pdf

http://www.mnhs.org/preserve/records/electronicrecords/erpreserve.php

http://www.episcopalarchives.org/collaborate/diocesan-and-parish-resources

Who will volunteer to work on a taskforce to recommend a policy on preservation of electronic records for Presbytery of Wabash Valley?

The issues remain the same (see below) and my advice remains:

- Record your minutes and rolls on archival paper using a laser printer or permanent ink.
- Because most of us use computers these days, you may record in computer and print on archival paper.
- Scan your original documents (articles of incorporation, bylaws, minutes and rolls) into your computer and save as pdf files—they are more difficult to change, either intentionally or inadvertently. PDF files are word or phrase "searchable." (*I store final presbytery files as pdf files secured so they cannot be changed; orderly computer files help with retrieval of information when needed.*)
- Periodically send the original, printed and signed copies of your minutes and rolls for storage with the Presbyterian Historical Society. (*I send our presbytery records each year following review verification.*) They cannot and will not accept copies.

Access and storage is the issue:

- You may continue to keep your printed copies of minutes and rolls on archival paper in the large, leather binders at the church. But the binders are not required nor is that unusual size required. Traditionally the binders provide a semi-permanent, protective place. If on your computer, don't forget to do backups. All records should be kept in the church files—not (only) your home office. *(I always send a copy for storage in the presbytery computer and backup, as well as my home office backup.)*
- Pages need to be numbered; you can do that automatically with PDF files.

For purposes of review and retrieval (in addition to the archived documents):

- **You may bring printed copies in notebook. For Synod review of Presbytery minutes, we send electronic pdf version to our assigned reader, who reads prior to our gathering of presbytery clerks, who note any issues to be resolved. When discrepancies are noted and shared with the presbytery's clerk, these may be corrected prior to final authentication of review by the Synod Clerk.**

From Wikipedia, "Records Management, Managing electronic records:"

The general principles of records management apply to records in any format. Digital records (almost always referred to as electronic records), however, raise specific issues. It is more difficult to ensure that the content, context and structure of records is preserved and protected when the records do not have a physical existence. This has important implications for the authenticity, reliability, and trustworthiness of records…

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Excerpt from letter to me May 8, 2014, from David Staniunas, Department of History, PC(USA):

…I should also mention that the Synod of the Northeast ruled in 2013 that only deposit of original records – not photocopies, not PDFs – with PHS conformed to the Book of Order. *[Confirmed by GAPJC in 221-08 May 4, 2014]*

Since then, we've transitioned from shooting microfilm to digital imaging. We shoot up to 16 x 24" in 24-bit RGB color at 300 dpi, compile the images to PDF, and deliver them by DVD or download, at a cost of $0.35 per page. As a point of reference, I've attached a guide to our digitization services.

…Where … congregations and presbytery agree that original records may be returned to the congregation, we will print microfilm from digital images and hold that as a secure copy, using the PDFs for access.

…As ever, we would happily take the church's original records on deposit. Session minutes and registers are of chief importance, but we gladly take in minutes of any councils of the church, such as deacons, trustees, women's and youth groups. There is no charge for this service, and the records will be housed in an environmentally controlled archival storage area with specialized fire detection and security systems. The presbytery retains ownership of the records of dismissed churches held on deposit, and may request their return at any time with written authorization of the stated clerk. Routine inquiries, such as baptismal attestations, may be directed to our dedicated staff of professional archivists. As a point of reference, I've attached our retention schedule for congregations, which lists materials we deem permanent and will accept on deposit.

***From the Advisory Committee on the Constitution to** the 215th General Assembly (2003) to disapprove **Overture 03-16**.* **Rationale:**

The latest technological tools and equipment, while useful for many tasks in the church, are nevertheless problematic as a sole source for production and permanent storage. Records equipment changes so frequently that equipment used currently may be outmoded in a few years. Electronically stored records may then become inaccessible. Although initially generated on computer, session records and church rolls should be regularly printed on acid-free paper for archival storage. Churches are encouraged to utilize the services of the Presbyterian Historical Society for establishing microfilm.

Presbyterian Historical Society has lots of resources for congregation and clerks with responsibility for maintaining the records:

http://www.history.pcusa.org/records/cong/

http://www.history.pcusa.org/records/cong/congregation.pdf

http://www.history.pcusa.org/records/cong/access_policy.cfm

Discussion:
- Shall we set up regional circles of six to ten congregations each to review minutes and rolls of one another using our standardized checklist, to be scheduled locally, and as a

separate event, organize an annual gathering of Clerk of Session for training and discussion of emerging issues?

- Shall we use the unified checklist for minutes and roll rather than separate checklists for each?
- What revisions would be useful to have as a guide for your work each year?
- What is the best way to provide training for new Clerks of Session? Typically, the pastor or previous clerk does the training, and there is Q&A at our regional gatherings. Shall we schedule a central training session, perhaps coinciding with time and place of the annual February Assembly?