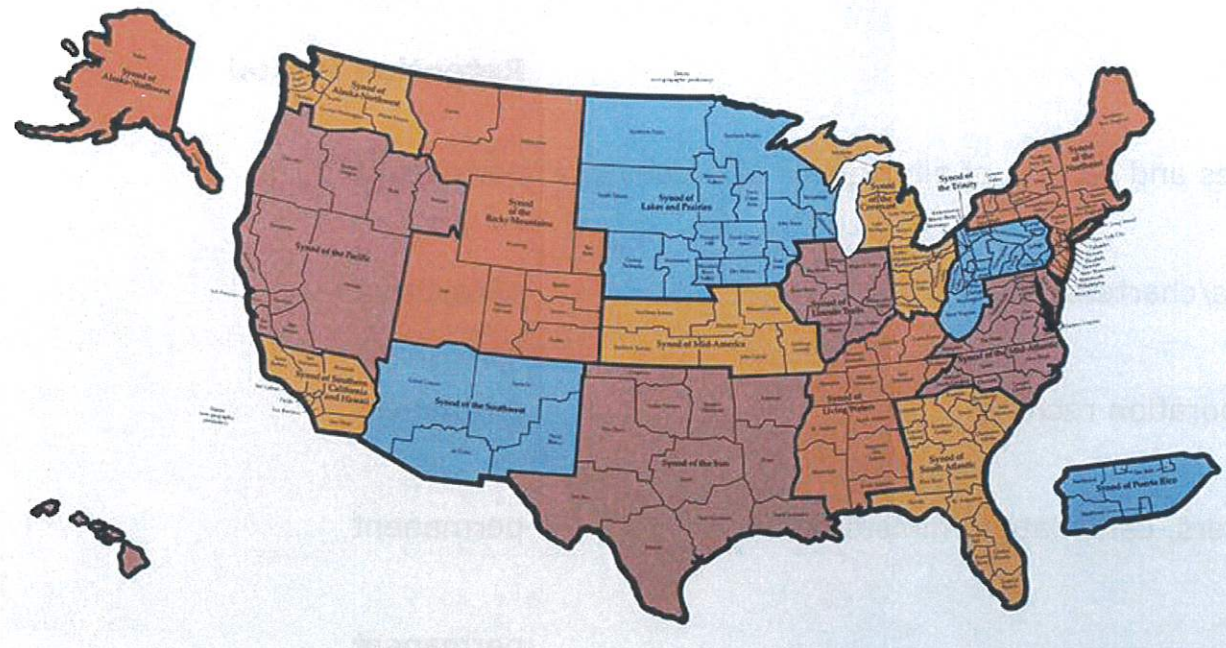


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## Records of Mid Councils

The Presbyterian Historical Society serves synods and presbyteries of the PC(USA) by digitizing records, holding permanent records on deposit, and providing advice on best practices for managing records.



### RECORDS DIGITIZATION

We digitize original records at a subsidized rate on behalf of presbyteries and departing congregations to ensure that all stakeholders have access to their shared historic record. Please contact our Records Archivist, [David Staniunas](#), for more information.

[\\_digitization](#)

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## RECORDS DEPOSIT

The *Book of Order* charges clerks with the "permanent safekeeping" of all official records. In order for synods and presbyteries to meet this obligation, all records of permanent value should be deposited at the Presbyterian Historical Society. In addition, presbyteries should ensure that original records of departing congregations, or a reliable archival surrogate of those records, are deposited at the society.

### Records Deposit

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## ADVICE ON RECORDS MANAGEMENT

The Presbyterian Historical Society provides advice to mid councils on records management but does not hold records of temporary value. Our retention schedule for mid councils follows below. Retention requirements for financial and administrative records vary from state to state. For further assistance, mid councils should consult Records Archivist David Staniunas, an accountant, or legal counsel.

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## RETENTION SCHEDULE FOR MID COUNCILS

<b>Types</b>	<b>Retention Period</b>
Minutes and reports of all councils of presbytery	permanent
Bylaws/charters	permanent
Incorporation records	permanent
Inquirers, candidates, ministers files	permanent
<u>Records of dissolved congregations:</u> Minutes, registers, charters, articles of incorporation, property records, etc.	permanent
Legal/judicial case records	permanent

Insurance records	permanent
Subject files: correspondence, minutes, or other records surrounding subject matter of continuing administrative or legal value, or comprising information on the mission, vision, and actions of the body	permanent
Annual reports	permanent
Annual budgets	permanent
Annual audits	permanent
Annual financial statements	permanent
Manuals/handbooks	permanent
Newspapers/newsletters	permanent
Brochures/promotional material (1 copy)	permanent
Photographs	permanent
Architectural drawings, plats, plans, blueprints	permanent
Wills, bequests	permanent
Loan agreements	satisfaction + 20 years
Property appraisals, records of sale	20 years after sale

Employee records	employment + 7 years
Contracts	active + 6 years
Accounts payable	7 years
Accounts payable invoices	7 years
Accounts receivable records	7 years
Bank statements	7 years
Canceled checks	7 years
Cash receipt records	7 years
Expense reports	7 years
FICA / W2 records	7 years
Payroll records	7 years
Petty cash records	7 years
Receipts of purchases	7 years
Bank deposit slips	3 years
General/routine correspondence (acknowledgments, requests, travel arrangements, etc.)	3 years

Travel plans/arrangements	3 years
Periodic financial statements	2 years
Data for updating mailing lists	1 year
Invitations	1 year
Meeting notices	1 year
Mailing lists	active
Reference/resource material	active

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