

“What if a church closes?”

Records of congregations that close or amalgamate should be directed to the Conference Archives.

## Frequently Asked Questions Concerning Recordkeeping

Section 091 of *The Manual* requires that the records of church courts be examined regularly. Individuals reviewing church records on behalf of presbytery and Conference Archives Committees, and those responsible for preparing those records, have raised these questions pertaining to matters not mentioned in sections of *The Manual* dealing with church records.

**Q. “Who has overall responsibility for a congregation’s records?”**

**A.** The official governing body. In the traditional system of church government, the official board (comprised of both the session and the committee of stewards) has responsibility for matters affecting the pastoral charge that are not assigned to any other bodies within the church.

In a unified form of church government, these responsibilities would fall to the overall governing body of the church, either the church board or church council. This suggests the overall governing body may take responsibility for the records of various church committees that are not specifically directed to have their records reviewed by presbytery. This may include the United Church Women (UCW), Christian Education, Sunday school, choirs, men’s groups, ad hoc committees, and so on.

**Q. “Are the minutes of a church’s governing body confidential to members of that body?”**

**A.** No, they are *not* confidential. *The Manual* does not address the issue of confidentiality per se, but it clearly states that records of a congregation’s governing body—minutes of meetings, congregational registers, and membership rolls—should be reviewed annually. See *The Manual*, Section 157.

Some congregations are reluctant to assist presbytery archives committees in the review of records. Congregations should be encouraged to see the process as a review of the *form* in which those records have been completed, and *not the content*. Form is necessary to ensure accuracy, consistency, and clarity. The group producing the minutes is responsible for reviewing their content carefully for accuracy and clarity.

**Q. “What types of information should the minutes of a church’s governing body contain?”**

**A.** Minutes must contain a complete record of a meeting’s activities, that is, they must also contain all information that pertains to the changes in the church’s membership roll (additions by profession of faith [confirmation], by reaffirmation of faith, by certificate of transfer, and by action of the church’s governing body; removals by death, by certificate of transfer, or by action of the church’s governing body) and the names of persons to be baptized.

**Q. “Is an action column acceptable for church minutes?”**

**A.** Yes. An action column indicates who is responsible for specific matters that arose out of a meeting. However, an action column should be included with the minutes *only* if the designation of who is to follow up on any action has also been clearly outlined *within the body* of the minutes. Designation within the minutes will ensure clarity should any questions arise.

**Q. “Our congregation has a unified governing structure (church board or church council). Does this make a difference as to how records are kept?”**

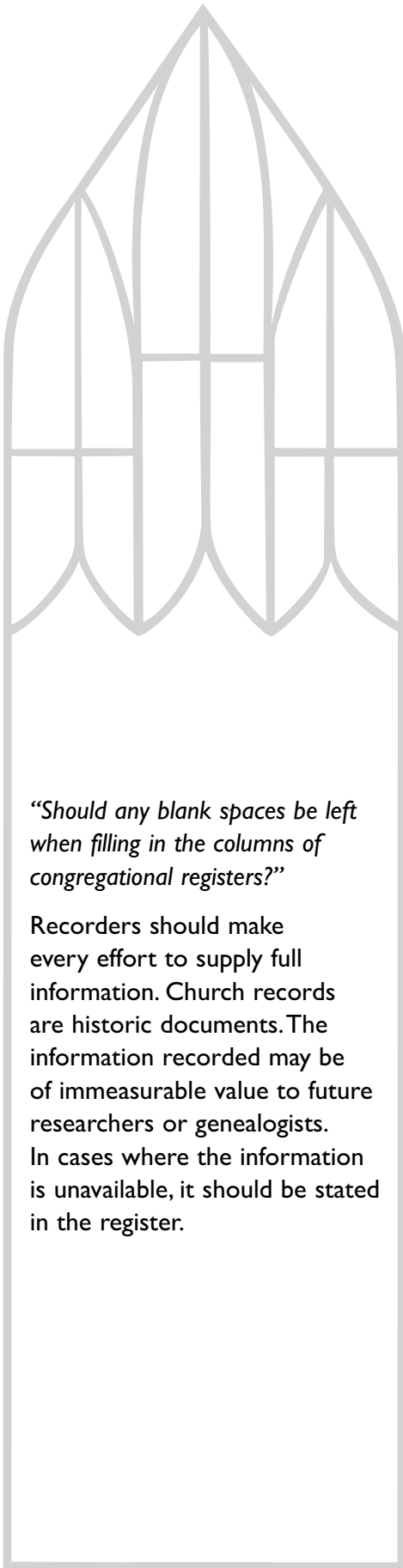
**A.** No. Some pastoral charges have combined their official board, session, and committee of stewards into one unified church board or council. See *The Manual*, Sections 200 to 228. The need to keep records that contain certain types of information remains unchanged. Functions formerly delegated to an official board, session, or committee of stewards must be picked up in whatever system of church government a pastoral charge adopts, including the function of recordkeeping.

**Q. “What is an historic roll?”**

**A.** An **historic roll** of membership is a permanent, comprehensive record of the names of all persons who have been confirmed members (that is, made their profession of faith) of the local congregation throughout its history. The historic roll is usually a handwritten list of names that is recorded in a bound book or ledger called an historic roll book. If the congregation was established many years ago, a complete list of all persons who had ever been confirmed members of that congregation could encompass several books. Historic roll books may be obtained through the United Church Publishing House.

Ideally, an historic roll includes the names of all confirmed persons ever associated with a congregation. However, most local congregations cannot do this because a formal system of recording names has not been followed consistently from the founding of the congregation, or because records have been lost. An historic roll may be started at any time by recording all those who are currently confirmed members of the congregation. The historic roll is then maintained by adding the names of all new members as they join the congregation (either through confirmation or profession of faith, by reaffirmation of faith, by certificate of transfer from another congregation, or by action of the congregation’s governing body) and accounting for the loss of members (by death, certificate of transfer, or by action of the congregation’s governing body).

When two congregations amalgamate, the historic rolls of the joining congregations should be closed and a new historic roll begun, as of the date of amalgamation. The new historic roll book would include the names of all confirmed members who affiliate with the new congregation.



*“Should any blank spaces be left when filling in the columns of congregational registers?”*

Recorders should make every effort to supply full information. Church records are historic documents. The information recorded may be of immeasurable value to future researchers or genealogists. In cases where the information is unavailable, it should be stated in the register.

**Q. “What information should be included on an historic roll?”**

- A.** An historic roll should contain the full name of the confirmed member at the time the member joined the congregation; residence address; date the person was received as a confirmed member; how that person was received as a member (by profession of faith, by reaffirmation of faith, by certificate of transfer, or by action of the congregation’s governing body); from where that person was received as a member (if by certificate of transfer); date the person was removed as a member; how that person was removed as a member (by death, certificate of transfer, or by action of the congregation’s governing body); and other comments if required.

*No names are ever erased from an historic roll.* The name of each person who has ever been a confirmed member of the church should appear on the historic roll of that congregation, even after that person has ceased to be a member. Those who have ceased to be members will have that fact noted after their name in the historic roll book. Names beside which there is no notation of removal would still be considered current members of the congregation. Names beside which there is a notation of removal would be considered former members of the congregation.

**Q. “Should the names of baptized infants be included on the historic roll?”**

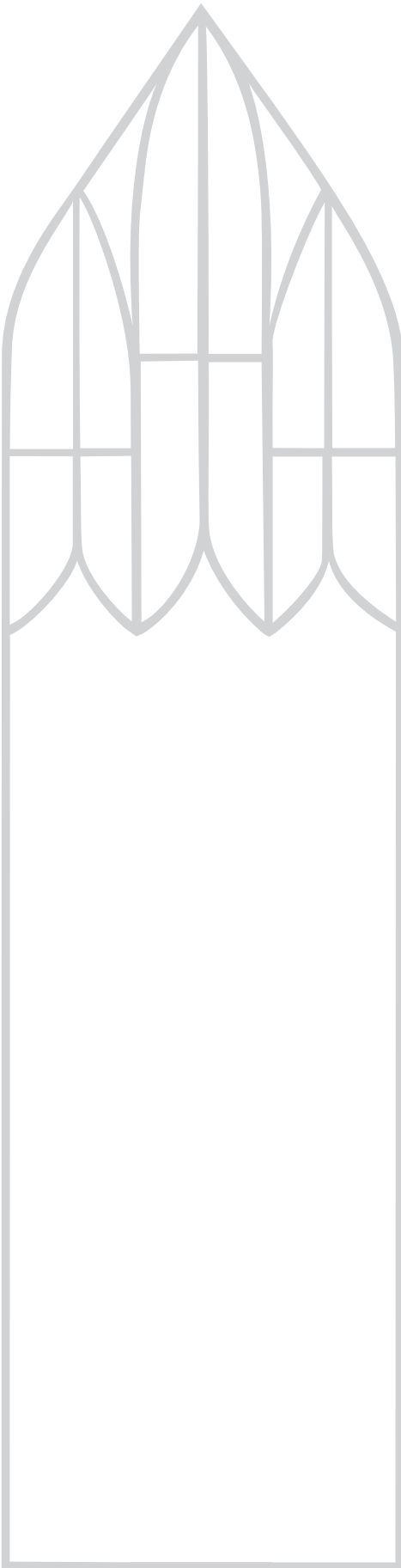
- A.** No. Children who receive baptism are members of the church universal, but they are not members of a particular denomination until they make a public profession of faith and are confirmed as members of a local congregation. The historic roll is exclusively a list of names of persons who are confirmed members of the local church, and United Church polity states that only those who have made their profession of faith and been confirmed are added to the historic roll of a particular congregation as confirmed, adult members.

**Q. “Should the historic roll of a congregation’s membership be alphabetical by name of member, chronological by date the member was received, or some combination of both?”**

**A.** Congregations differ in how they maintain their historic rolls. Of the methods that follow, congregations should choose the one that best suits them.

- Congregations may list members’ names on their historic roll alphabetically. When people are received as new members, their names are recorded under the appropriate letter of the alphabet. When the alphabetical sections of the historic roll book are filled, names are then recopied into a new historic roll book. When recopying the historic roll, only the names of current members of the congregation are re-recorded into the new list. The names of persons who are no longer current members of the congregation are not transcribed, and for future reference, their permanent record of membership may be found in the previous volume of the historic roll book. When a new historic roll book is begun, the previous volume of the historic roll should be closed. The date of closing and a statement that a new book has been started should be clearly indicated. The current historic roll would then be contained in one volume.
- Congregations may list members’ names on their historic roll alphabetically, as above. However, when one book becomes full, a new one is started without recopying any names. New names would be added to the new book only. The current historic roll would be contained in two (or more) volumes.
- Congregations may list members’ names chronologically by date of admission into membership. An exclusively chronological list, however, makes it difficult to locate people, particularly if the congregation is large and the date of admission is unknown. Some congregations maintain both an alphabetical list by name and a chronological list by date of admission.
- A variation on the chronological system uses roll numbers to solve some of the difficulties inherent in a straight chronological listing. Congregations may enter the names of individuals into the historic roll chronologically. In the column headed “Roll Number,” each person is assigned a unique and permanent consecutive number. That number is always associated with that member. To ensure easy access to the information on the roll, congregations should maintain a separate alphabetical index. Such an index would consist of two columns—one for the name, and one for the unique roll number for each person. The index need not be strictly alphabetical. All “A” last names would be kept together with room to add additional “A” last names before beginning a list of last names beginning with the letter “B.” This method would save time searching for a particular name.

Regardless of the means by which historic rolls are maintained, all changes to a congregation’s historic membership roll must also be recorded in the minutes of the congregation’s governing body.



**Q. “How does an historic roll differ from a current membership list?”**

**A.** They are distinctly separate documents, and each congregation should maintain them separately.

An **historic membership roll** records the name of everyone who has ever been a confirmed member of a congregation from a given point in time, ideally from the beginning of the congregation.

A **current membership list** is a separate document containing information taken from the congregation’s historic roll. The current membership list of a congregation includes the names of all those persons on the historic membership roll beside which there is no indication of removal, either by death, by transfer, or by action of the congregation’s governing body.

Along with a current membership list, a congregation should also keep a comprehensive list of adherents. Adherents are those adults and children who have some affiliation with the congregation but who are not confirmed or professed members of that congregation. The list of confirmed members and the list of adherents together comprise a complete record of all persons currently associated with a local congregation.

The governing body of a congregation is responsible for maintaining the current membership list based on the information taken from the congregation’s historic membership roll. The current membership list should be updated at least annually, usually in conjunction with a review of the historic roll. A complete list of a congregation’s current members, along with its list of adherents, should appear at least annually in the minutes of the congregation’s governing body.

A current membership list should not be confused with a congregation’s **household list** or **mailing list**, terms that are often used interchangeably. A current membership list is a list of members’ names. A congregation’s household list includes the names of all households, be they member or adherent, and is used for congregational mailings.

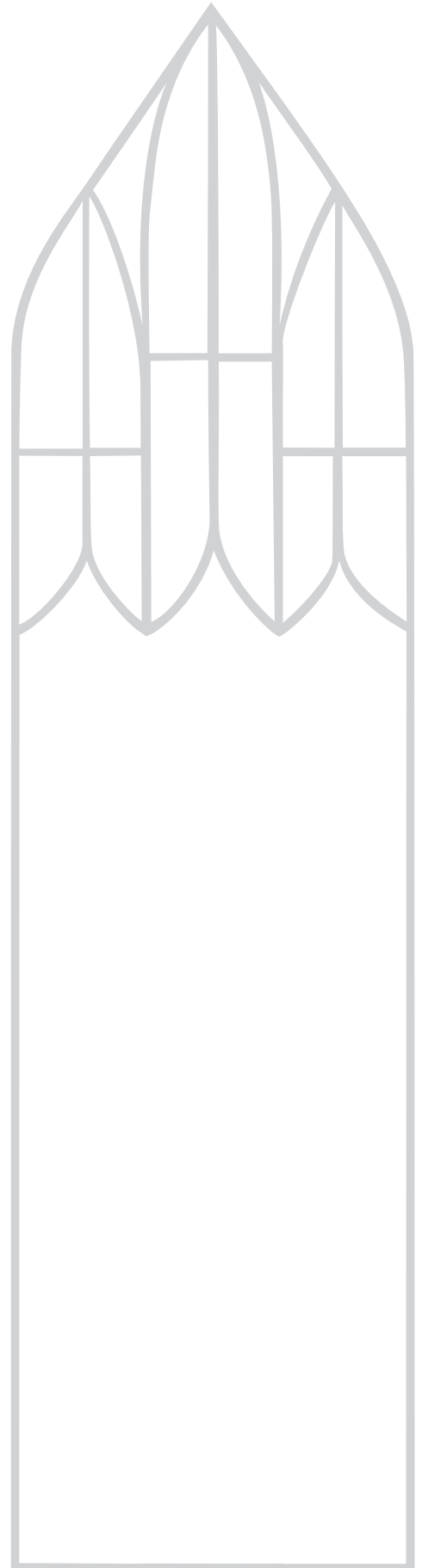
**Q. “What is the difference between resident and non-resident members?”**

**A.** Names on the historic roll of a congregation, beside which there is no indication of removal, are used to compile the current membership list of the congregation. United Church polity states that all persons on the current membership list must be categorized as either resident members or non-resident members.

A **resident member** is a confirmed member of a congregation who lives close enough to the local church to take part in its worship services and activities regularly. A **non-resident member** is a confirmed member of a congregation who has moved to such a distance from the congregation that the governing body of that congregation no longer expects that person to attend regularly.

Categorization of the current membership list into resident members and non-resident members is important because a congregation’s financial assessment from presbytery and Conference may be determined, at least in part, by the number of resident members in the congregation.

The line between these two definitions—resident and non-resident—can be blurry. A congregation must determine on a case-by-case basis an appropriate status for each member, depending on that person’s geographic location and amount of involvement in congregational life. For example, a member of a local congregation in Montreal who has moved to Vancouver, but who has not formally transferred church membership, would be classified as a non-resident member of the Montreal congregation. A member of that same congregation in Montreal who moves 50 miles away from the city, but who still attends that church regularly, could logically be considered a resident member. If the same person no longer attended that congregation regularly, the person could and should be classified as non-resident.





Recommendations made by record review committees should be followed in a timely fashion. This will ensure the integrity of records is maintained according to the standards outlined by *The Manual*.

**Q. “What is a communion roll?”**

**A.** The list of current members of a congregation is sometimes called the **communion roll**. The term communion roll dates from the time when it was customary for only confirmed members or “members in full communion” to partake of the sacrament. Formal bound communion rolls contain the same information as current membership lists, except that there is space to record a member’s attendance at communion. In the United Church, an individual’s attendance at communion is now only rarely recorded.

**Q. “What suggestions can be offered for those responsible for keeping presbytery minutes?”**

**A.** All matters that are the sole responsibility of presbytery need full and careful documentation for both legal and historic reasons. This is particularly important when presbytery is dealing with property matters.

Be thorough in what you include in presbytery minutes, for example, reports of covenanting services between members of the Order of Ministry and congregations, funerals and memorial services for deceased members of presbytery, agendas, and at least annually, the roll of members of the Order of Ministry for the presbytery. All changes in the status of Order of Ministry persons should also be fully noted.

Presbytery executive often acts for the presbytery between its regular meetings. The minutes of presbytery executive should be inter-filed with those of presbytery, and within the consecutive numbering pattern. It is recommended that the motion naming the specific powers delegated to the executive of presbytery by the presbytery be included in the minutes of each meeting of presbytery.

**Q. “To whom should committees assigned to review records report?”**

**A.** Section 091 of *The Manual* instructs records review committees to report their findings to their respective church courts and include those reports in the records of those courts. Presbyteries should also report to Conference how they have responded to instructions arising out of the Conference’s previous annual review of its records.