

Unitarian Church of Montpelier

Church Records Policy

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Introduction

This document includes the following sections, in relation to church records:

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1. Policy and Rationale

The policy of the Unitarian Church of Montpelier (UCM) is to preserve, maintain, and protect its records, and to make them accessible to members and other interested parties. The Historian, in cooperation with the administrative staff, officers, and others (as described in Section 8 below), will carry out the policy as a core institutional activity in support of the church's mission.

The adoption of a comprehensive, clear, and effective policy and – to implement the policy – a records management plan, reflects the congregation's present commitment to preserve and make accessible records of continuing value. Records are valuable assets for appreciating and understanding the church's long history. In turn, records of the breadth and depth of the church's history will be an accurate resource of meaning, value, and use in future years.

2. Scope and Definition

Church records encompass any documents that are created, received, or maintained in any format or media that relate to the church's mission, goals, governance and operations, activities, and history. They are defined by content rather than format. Records include, but are not limited to, governance (i. e., Board and Executive Team) meeting minutes, formal committee and task force reports and records, documents of legal significance, publications, fiscal data, official correspondence, photographs, and audiovisual materials.

Artifacts, artwork, and books may be accepted along with documents. For purposes of this policy, records are defined broadly to encourage the retention of, and accessibility to, valuable information created in the course of church business.

3. Ownership of Records; Sermons; Membership and Personnel Records

All records created, received, or maintained by the church are church property. No church employee, officer, or member, by virtue of his or her position, has any personal or property right to such records, even if he or she may be named as the author, recipient, or custodian of them.

The minister is the owner of her or his sermons. If she or he agrees, they may be included in church records.

Membership records, such as lists of members or participants in church programs, and personal information about church members, including their contact information, are not public and are maintained for official church use only. Regarding personnel records, while general information, such as personnel policies, job descriptions, and number of employees are not confidential, other records, for example, staff evaluations and supervisory notes, are confidential.

4. Official Record Copy

The official record copy, which serves the documentary needs of the church, is, in most cases, printed on paper and filed accordingly. Official paper copies are not necessarily original records, if, for example, original records are not available, as with outgoing correspondence, where the original is sent to the addressee. A digital record usually serves as an additional format for accessibility and preservation. Those responsible for creating and preserving records, however, may decide that a digital record may serve as an official record copy.

It is essential for those creating and preserving records in digital formats to be aware of, and to adapt to – as appropriate and as resources permit – changes in the technological landscape. This approach will help to ensure the authenticity, accessibility, and security of church records in the future.

5. Critical Records

“Critical records” are those determined to contain essential information needed for operational continuity following a catastrophic event. As appropriate and feasible, the Historian will work with the Administrator and Executive Team to determine which records are to be considered “critical,” and to develop procedures to protect and make them accessible after such an event.

6. Space and Financial Support

It is anticipated that sufficient and adequate space will be made available for safe storage of church records, including artifacts. In addition, it is anticipated that funds will be provided in the church budget, and through supplementary grants from, for example, the Vermont-Quebec Universalist Unitarian Convention, for the appropriate care and preservation of records.

7. Responsibility for Establishing and Revising the Records Policy

The Executive Team is responsible for establishing the church records policy. Guided by recommendations from the Historian, and based on a thorough review and evaluation, the Executive Team may revise the policy as necessary and appropriate.

8. Responsibility for Implementing the Policy; Records Management Plan

The Historian, in cooperation with the administrative staff, Board Secretary, Executive Team, Council of Chairs, managers of the church's web site, and others who create or maintain records, is responsible for implementing the records policy. This will be accomplished through the preparation and operation of a records management plan. The plan will include a comprehensive retention and disposition schedule for permanent and temporary records, and guidelines for, among other activities, collection, access and use, and digital records management. In addition, the plan will include such details, for example, as a file naming convention for documents.

In addition to formal committee and task force reports and records cited in Section 2 above, the Historian – through a participatory process – will encourage all creators of records to evaluate them through the lens of the church's mission, goals, governance and operations, activities, and history, and to direct records of enduring value to the Historian. The records management plan will provide, for committee and task force chairs and for the wider church community, guidelines for selecting records of value.

The Historian may, as necessary, seek the cooperation of the Executive Team in forming a church records committee, for the purpose of more effectively implementing the records management plan.

The Historian will report to the Executive Team, every two years in May, beginning in 2014, on the implementation of the records policy.

The Historian – in cooperation with the Executive Team and others whose contributions will be pertinent – will, as the spirit moves, revise the records management plan.

9. Cooperation with the Vermont Historical Society (VHS)

The Historian will work with VHS staff to determine the appropriate timing of the transfer to VHS of selected archival materials and artifacts. VHS owns, maintains, and preserves extensive UCM materials, originally transferred by Church Historian, Jean Cate, in 1992. The records were supplemented by an extensive transfer in 2010.