

Records Management Policy

Purpose

This policy defines principles and standards for the management and retention of records of the Community of Christ. It provides a framework for other directives, procedures, and retention schedules that pertain to specific types of Church records and record keeping practices.

Policy Statement

The records of the Community of Christ are valuable assets that contain information pertaining to the Church's mission, initiatives, activities, operations, heritage, and legacy. Stewardship of information assets is an important responsibility of all World Church employees, Mission Center officers, and Congregation officers. Records with lasting legal or operational value or those that document the Church's history and accomplishments must be identified and preserved. Other records are to be discarded in an orderly manner when no longer needed.

Definition of Church Records

Church records include any and all recorded information that is created, received, or maintained by the Community of Christ or its World Church employees, Mission Center officers, and Congregation officers in the course of Church business and that relate in any way to the Church's mission, goals, objectives, organization, initiatives, operations, activities, heritage, or legacy. This definition of church records is applicable in all countries where records are created, and encompasses both originals and copies of recorded information in all formats and media, including but not necessarily limited to:

- Paper documents, including office documents, engineering drawings, architectural plans, and maps
- Photographic films and prints
- Microfilm, microfiche, aperture cards, or other microform media
- Computer files and databases stored on magnetic or optical media
- Audio recordings
- Video recordings

This definition of Church records encompasses notes, working papers, and drafts of documents that are created, received, or maintained in any format or media.

Ownership of Church Records

All records created, received, or maintained by World Church employees, Mission Center officers, or Congregation officers in relation to the Church's mission, goals, objectives, organization, initiatives, operations, activities, heritage, or legacy are Church property. No World Church employee, Mission Center officer, or Congregation officer has, by virtue of his or her position, any personal or property right to or property interest in such records, even though he or she may be named as the author, recipient, or custodian of them.

Records developed in the course of the church's ministry are the property of the church. This includes material such as lists of members or participants in church programs and letters written by persons acting in an official capacity for the church. Personal information about church members, including their addresses and telephone numbers, is maintained for use in official church functions only.

Official Record Copy

The official record copy, which serves the documentary needs of the church, is, in most cases, a printed copy, which is also known as a "hard copy." This means that the document is printed on paper and filed accordingly. The Church has designated a paper document to be the official record copy for most retention purposes. There are only a few exceptions to this policy; they include Shelby, some accounting records, and some electronic media records (video tape, etc.).

Official record copies are not necessarily original records. They may be photocopies, for example. The Church does not always have original records to serve as official copies. This is obviously the case with outgoing correspondence, where the original is sent to the addressee and the writer retains a copy.

Retention Standards

All Church records must be retained and disposed of in accordance with the following standards:

- The Church's Records Retention Schedule specifies how long specific types of records are to be kept for legal reasons, to satisfy the Church operational requirements, and to document the Church's values, history, and accomplishments.
- The Church's records retention policies and practices will comply fully with all applicable laws and regulations. The Church will make and keep adequate records to document its compliance with all applicable laws and regulations.

- Where the same information exists in multiple copies, the Church's retention schedule designates one copy as the official copy to satisfy the stated retention requirements. The schedule lists records by department or other functional groupings. Unless otherwise specified, the official copy is held by the office that corresponds to the functional group under which the record is listed in the schedule. All other copies are considered duplicate records.
- The Church will never alter or destroy records that must be kept for pending or ongoing litigation, government investigations, tax audits, or other legal actions until those matters are resolved. When circumstances warrant, the Legal Services department will issue written directives that formally suspend the destruction of specific records until further notice.
- Records will be destroyed promptly when the time periods specified in the Church's retention schedule elapse in order to reduce the cost of storing, indexing, and handling the large quantity of records that would otherwise accumulate.
- The records will be destroyed in a manner appropriate to the contents of the records and to the media on which the records are made. Safety and security are also required elements in the destruction process.
- The Church will take all reasonable precautions and prudent actions to identify and safeguard records that are vital to the Church's mission, goals, objectives, organization, initiatives, operations, activities, heritage, or legacy.
- Privacy and security of Church records must be appropriately assured.

The church's Records Retention Schedule is developed by the World Church Records Manager in consultation with church offices and is also reviewed by Legal Counsel and the Church Archivist. Changes to the schedule are made if needed during its periodic review or as new or special conditions arise.

The foregoing retention standards apply to any and all records that are created, received, or maintained by all headquarters departments, mission centers, and congregations and also apply to Church records that may be maintained in the homes of employees or officers or other offsite locations.

Responsibility for Records Management Program

The World Church Records Manager is responsible for establishing and implementing the Church's records management program, including a

comprehensive retention schedule that is based on the standards delineated above. The ultimate authority and responsibility for the World Church records management program resides with the World Church headquarters **Executive Coordination Team (ECT)**, which is guided by recommendations presented by the Records Manager.

Compliance

All World Church employees, Mission Center officers, and Congregation officers must comply fully and consistently with this policy for all Church records in their custody or under their supervisory control. Retention schedules should be implemented, and obsolete records discarded, at the earliest practical opportunity.

Exclusions

The following information-bearing objects are not considered records and, as such, are specifically excluded from the Church's retention policy:

- Books, periodicals, catalogs, and other publications or library materials acquired solely for reference purposes
- Memorabilia and museum materials acquired solely for exhibition
- Unused or undistributed stocks of church publications
- Blank business forms
- Unused copies of form letters
- Unsolicited brochures, flyers, advertisements, mass mailings, e-mail messages, or other records that are unrelated to company business
- Personal papers of Church employees (i.e., papers of a private nature that pertain solely to an employee's personal activities and interests and have no relationship to the employee's assigned duties or to the Church's mission, goals, objectives, organization, initiatives, operations, activities, heritage, or legacy)

Interpretation and Assistance

At the mid-level, the Mission Center Financial Officer is responsible for implementing the records management program at the mission center, congregation and campground association level in her/his area, and submits questions relating to compliance to the Records Manager.

Such questions about interpretation and implementation of this policy or the Church's record retention schedule and any related directives, procedures, or guidelines may be directed to the World Church Records Manager at 800-825-2806 or via email at ashiels@CofChrist.org. The Records Management Policy may be found on the following web page: www.cofchrist.org/cfo/default.asp#records.