

The Stated Clerk of the Presbyterian Church (U.S.A.), A Corporation (A Corporation), in accordance with the Standing Rules, has designated records management responsibilities to the Presbyterian Historical Society (PHS), the official archives of the denomination. Since 1988, PHS has operated a formal records management program based in the Presbyterian Center, working with the Office of the General Assembly (OGA), other General Assembly agencies, and all other levels of the denomination to create records retention schedules that ensure efficient filing, timely destruction, and cost-effective storage for records of the denomination.

Records generated during an employee's tenure with the Corporation are the property of the Corporation and fall under the Ethics Policy of the A Corporation including responsibility for "safeguarding all physical, financial, informational, and other PMA/OGAASG assets and records." (See Ethics Policy for Employees of the Presbyterian Mission Agency, the Office of the General Assembly, and the Administrative Services Group of the Presbyterian Church (U.S.A.), A Corporation). Each staff member of the A Corporation is responsible for the retention, maintenance, and disposition of records they create during the regular course of business. It is important to remember that the information contained in electronic records systems must be managed as resources and assets of the A Corporation. All records, *regardless of format*, must be retained until the relevant legal, fiscal, and administrative retention periods have been met. This includes word processing files; electronic spreadsheets and databases; digital photographs, audio or video recordings; email and attachments; webpages; and electronic publications such as newsletters, brochures, reports, and resources on CD, CD-ROM, DVD or other portable storage devices.

The following records should be identified and preserved: records crucial to documenting the institutional memory of the Presbyterian Church (U.S.A.) and showing the history, culture, and how it operated; its programs and decision-making; and evidence of its policies and procedures over time. Such records include publications, resources, committee minutes, official correspondence, audits, general ledgers, and grants awarded files, to name a few record types.

Information Technology backs up servers maintained by the A Corporation. Those backups are recycled at scheduled times. The backups help restore a system in the event of a disaster but are not a permanent storage medium. The PHS also discourages long term storage of electronic records on diskettes, CDs, DVDs or flash drives because of their long-term instability.

In order to ensure long term preservation of permanent records created in electronic formats, the records must be **transferred to the archives via an accepted electronic transfer by the archives or IT.**

Staff is responsible for ensuring the integrity of their records or systems and that business conducted by electronic means is adequately documented. Electronic records shall be preserved

without loss of vital information as long as required by the A Corporation and by state and federal statutes. Under no circumstances may an employee destroy or delete any records, either in electronic or hard copy format, that have been placed under litigation hold or may reasonably be relevant to anticipated litigation.

The Records Manager and PHS will assist departments of the A Corporation in determining the administrative, legal, and historical value of all records. The length of retention for these records will be assessed accordingly. A General Schedule governing retention for records found in most offices is available at <http://pma.pcusa.org/ministries/centernet/office-general-assembly/>.

The General Schedule lists the minimum amount of time records in both hard copy and electronic formats must be kept, and instructions are included for their disposition. Staff must refer to the General Schedule when destroying records. Retention schedules for records unique to particular departments are available via the Office of General Assembly link above. All questions concerning the length of retention for records not included on one of the retention schedules or the General-Schedule should be referred to the Presbyterian Center's Records Manager (X5246) or to the PHS (refdesk@history.pcusa.org).

Approved by the Presbyterian Church (U.S.A.), A Corporation Board
March 29, 2019