

Database and Records

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Database

Overview of Church Database

The church database (Planning Center Online) keeps track of our congregants' names, addresses, contact information and the groups/classes they participate in. The database also tracks membership status, pledges, donations, pastoral notes, family members, and other key information regarding their participation in the life of the congregation.

Access to the church database shall be restricted based on a need-to-know basis, and congregant's confidentiality is protected particularly in terms of protecting the pastoral privilege. Permission to have access to the database must be granted by our Director of Finance and Administration (DFO).

Oversight and Quality Control

Membership Rolls Quality Control

The Foothills staff will make an effort to keep the membership rolls accurate.

- Every year the DFO will take the following steps to ensure the accuracy of our membership:
- Pledge commitments will be considered an affirmation of continued membership. Steps will be employed to affirm membership for members who do not contribute a financial pledge.
- A letter from the ministers to non-pledging members and inactive members will be sent explaining the need to update membership records. This can be done electronically.
- Members who do not respond to the letter in the time allotted - not to be less than 2 weeks - will be changed to "inactive" and not counted in the official membership number.

This process will certify the number of members which will be reported to the Unitarian Universalist Association by February 1 of each year.

Database

Workflows

Database

Reporting

Database

Permission Structure

Records Retention

Records Retention

Human Resources

Accounting/Finances

Financial Records	Minimum Retention Period
Accounting General Ledger	One year + current
Audits (Inventory)	Until updated + one year
Audits (Financial)	Permanent
Bank Account Records	Six years + current
Bonded Indebtedness Records and Payments	Permanent
Budget Preparation Records and Budget Documents	Six years + current
Insurance Policies	Term of Policy
Payroll Records	Two years + current
Pledging Records	Three years + current
Purchasing Records	Two years + current

Records Retention

Photos

Programmatic Records

Administrative Records	Minimum Retention Period
Agenda and Official Minutes of Board Meetings and Committees	Permanent
Building Blueprints, Floor Plans and Architectural Drawings	Permanent
Building Use Records	Three years
Calendars and Scheduling Records	Three years
General Correspondence	One year + current
Information on the establishment and implementation of policies and procedures, including manuals	Permanent
Organization Charts	Permanent

Membership Records	Permanent
Personnel Records	Seven years
Publications	Two years
Special Programs and Events Schedules and Records	Two years
Sunday Service Recordings	Three years

Church Archives

There is a designated area in the Church basement for the accumulation and storage of the Church archives. This area shall be uniquely maintained for such purpose and no other.

Suggested Foothills Archive Practices

Drafted November 2025 By Rev. Gretchen Haley, Senior Minister

For now, we are only focusing on the printed materials we already have. After this, we will move towards a practice of printing some of our digital materials. And then we will organize our digital materials.

Suggested Categories for Archival Materials

1. Foundational and Historical Documents

- Founding charters, constitutions, and bylaws
- Unity Records (volumes from 1898 onward)
- Key congregational minutes (e.g., early foundational meetings, mergers)
- Historical narratives written by members
- Artifacts tied to milestones (e.g., the 100th anniversary, original architectural sketches)

2. Governance, Property, and Financial Records

- Board of Trustees minutes
- Congregational meeting minutes
- Annual reports

- Treasurer's reports and endowment records
- Fundraising and campaign materials
- Building and property plans (significant renovations or expansions)

3. Worship and Ritual

- Orders of Service
- Memorial records, weddings, dedications, and other special services
- Sermons (printed and recorded)

4. Membership and Community Life

- Membership books, membership lists and directories
- Obituaries and memorials
- Family information files
- Records of births, deaths, marriages, and major life events

5. Programmatic and Committee Work

- Reports and minutes of key committees (e.g., Religious Education, Women's Alliance, Search Committees)
- Historical overviews of programs like Religious Education, music, and social justice initiatives
- Special projects (e.g., Medieval Faire, interfaith collaborations)

7. Denominational and Interfaith Connections

- UUA-related materials (keep summaries; defer to national archives where appropriate)
- Records of Mountain Desert District involvement
- Correspondence with other UU or interfaith organizations

8. Non-Foundational Artifacts

- Photos, posters, and promotional materials
- Historical plaques, banners, and memorabilia

Guidance for Storage Practices

High-Priority to Keep Indefinitely:

- Founding and governance documents (e.g., Unity Records, constitutions, bylaws)
 - Unity Church Charter kept in ministers' office
- Membership books and annual reports
- Congregational and Board minutes
- Search Committee Records
- Records of ministers, staff, and elected leadership at least once per year
- Worship-related records of historical or liturgical significance (e.g., dedications, milestone services). Here is specific guidance for orders of service:

- Keep all orders of service through 2014 that we have on file, after that, keep the following:
 - Water Communion Ceremony
 - Flower Communion Ceremony
 - Remembrance Sunday
 - 1-2 from Holiday Season
 - Easter Sunday
 - 1-3 others from the “regular” church year
 - Installations, Ordinations, Retirement services
- Historical narratives written by members or about the church’s role in the community
- Results / Final Reports of Visioning and Strategic Plans

Representative Sampling (Keep Highlights):

- Routine committee notes, i.e. Endowment, Finance, Religious Education, Music, and other committees
- Notes from Strategic Planning and Visioning Sessions and their supporting committees
- Newsletters: After 2014, keep annual or quarterly highlights instead of all issues.
- Sermons:
 - Focus on sermons that reflect key themes or turning points in the church's history. For example at the start, or end of the church year. Around major social events.
- Newsclippings, photos and posters: Prioritize articles and images depicting significant events, milestones, and changes in church life.

Let Go:

- Duplicates of histories, newsletters, or promotional materials
- Denominational conference records (available elsewhere)
- Routine financial records (e.g., weekly offering data, minor transactions)
- Objects or plaques with unclear relevance or duplicative recognition
- Storage types that are no longer accessible due to outdated technology

If you have any question about keeping an item or not, consult with a group of still-invested members who have been in the church for more than 30 years, and ask them if it is acceptable to let go of an item. The majority of their group can rule on this. So that we don’t wonder later if we have retained an item or not, keep a record of what we have let go of, and in what method (i.e. given to other archives, recycled, etc.)

Exceptions Log

Organizational Guidance

[Anti-Nepotism Policy](#)

Date
