

Service Bulletin

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WHAT IS ARCHIVAL-HISTORICAL MATERIAL?

The following is a brief general checklist of the items that are normally of value to the archivist–historian and researcher. Resources fitting any of these categories should typically be preserved, labeled and filed. Variations in application will immediately become noticeable when a specific organization is involved. This list suggests rather than prescribes. Please write to the Institute for answers to any specific questions that you may have.

1. **Board and Conference Minutes** – These ought to be “religiously” preserved, especially if the board or conference is responsible for policy formation and decisions.
2. **Correspondence** – All official correspondence dealing with policies, functions, personnel, plans and programs of an organization should be included.
3. **Reports** – Any reports issued by executives, boards or agency personnel or staff members relating to the work or to surveys and activities, plans and projections, including annual reports, should be placed into the archives.
4. **Financial Records** – Regardless of form, basic financial reports (balance sheets, income/expense statements, audit reports) should be retained. Generally, annual financial reports supersede more frequent interim reports and contain identical information; in that case, the annual report will suffice. Once financial statements have been audited, supporting documentation such as invoices, disbursement vouchers, cancelled checks, deposit slips, bank statements, payroll records, offering envelopes and other donor records need not be permanently retained. Donor records and payroll records should be retained for up to six years to support tax–related inquiries, after which they may be destroyed.
5. **House Organs** – Newsletters, bulletins, pastoral and executive letters appearing serially and similar communications should be preserved.
6. **Policy Statements** – Directives and regulations issued by or to executives or other personnel that explain and describe policies and procedures are archival in nature.
7. **Photographs** – Pictures of personnel, executives, boards, buildings, properties, special events, etc., are important and should be clearly identified and dated.
8. **Orders of Service** – Service folders for special events, such as installations, funerals, groundbreaking and cornerstone–laying services, dedications, anniversaries and other special events should be retained.
9. **Audiovisual Materials** – Films, photographs, slides, audio and video recordings and similar materials from special events should be preserved.
10. **Physical Objects** – Items such as worship equipment, appointments and paraphernalia used in the service of the organization, in mission activities, in church and school, etc., may be helpful in depicting the life and work of an organization and its cultural context.
11. **Miscellaneous** – Any documents, manuscripts, ledgers, books, pamphlets, etc., that describe or document the work of the organization are also important and should be considered for retention.