

## GLR Recommendations And Resources For Ministry

### I. REGIONAL BOARD

#### A. RBA Rules Of Engagement

As responsible members of the RBA, those called to represent the conference of the Great Lakes Region, we will ...

1. Talk straight with each other, being sure to include the “last ten percent” of the conversation which most people want to withhold.
2. Demonstrate respect with each other, encouraging diversity through the “right to disagree” and keeping our deliberations principle-centered.
3. Pray for one another and properly prepare individually – spiritually, emotionally and mentally – for each and every session, in order to contribute to our board’s effectiveness.
4. Stay on task and focus on the agenda – our Kingdom mission – which means checking any “personal agendas” at the door and giving each other permission to make the call for an agenda check when necessary.
5. Be present in the present, minimizing distractions and interruptions by silencing our cell phones and avoiding the internet during meetings.
6. Function within our clearly defined role and responsibility as the RBA, working in partnership with other boards to facilitate oneness and teamwork within our region – we will not micro-manage.
7. Pursue excellence as good stewards, seeking God’s wisdom and courage to serve the best interests of our region.
8. Honor God and each other through our leadership – our interpersonal relationships and our business dealings.

### II. REGION/LOCAL CHURCH DOCUMENTATION

#### A. Document Retention

The Church shall retain documents for the period of their immediate or current use, unless located in the following document retention schedule. Documents that are not listed, but are substantially similar to those listed in the schedule shall be retained for the appropriate length of time.

Type of Document	Length of Retention
1. Articles of Incorporation	Permanent
2. Audit reports from accountants	Permanent
3. Audited financial statements	Permanent
4. Bylaws	Permanent
5. Checks for important payments (taxes, property, etc.)	Permanent
6. Contracts and leases still in effect	Permanent
7. Corporate Charter, constitution	Permanent
8. Correspondence (legal and important matters)	Permanent

9. Deeds, mortgages, and bills of sale	Permanent
10. Depreciation schedules	Permanent
11. Endowments and permanently restricted contribution records	Permanent
12. Insurance records (accident reports, claims, policies, etc.)	Permanent
13. IRS examinations, rulings comments	Permanent
14. Litigation records	Permanent
15. Minutes – board and any committees	Permanent
16. Personnel files of current employees	Permanent
17. Personnel files of terminated employees	Permanent
18. Retirement and pension records	Permanent
19. Tax and information returns (State and Federal)	Permanent
20. Tax exemption application and letter	Permanent
21. Trademarks, copyrights, patents, and related papers	Permanent
22. Accounts payable and receivable ledgers and schedules	7 years
23. Canceled checks	7 years
24. Contracts, mortgages, and notes that are expired	7 years
25. Donor contributions (numbered receipts)	7 years
26. Functional expense analysis and distribution schedules	7 years
27. Inventories of products, materials, and supplies	7 years
28. Journals	7 years
29. Payroll records and summaries	7 years
30. Timesheets	7 years
31. Employment tax records	4 years
32. Accounts payable and receivable	3 years
33. All correspondence (other than legal and important matters)	3 years
34. Bank reconciliations	3 years
35. Bank statements	3 years
36. Duplicate deposit slips	3 years
37. Employee applications	3 years
38. Insurance policies (expired)	3 years
39. Internal audit reports	3 years
40. Invoices (after payment)	3 years
41. Leases (after termination)	3 years
42. Monthly financial reports and statements	3 years
43. Service contracts (after terminations)	3 years
44. Working papers: accounting, budgets, cash flow, financial reports	3 years

**B. Electronic Documents**

Electronic documents shall be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the above schedule shall be maintained for the appropriate amount of time.

**C. Document Destruction**

Each department is responsible for the ongoing process of identifying its records, which have met the required retention period and overseeing their destruction. Destruction of the documents may be accomplished by shredding or burning.

D. Suspending Document Destruction

Upon any indication of an official investigation of the church by the IRS or any governmental entity, document destruction shall be suspended immediately. Destruction shall be reinstated upon conclusion of the investigation (GB-357 – May 2007).

III. LOCAL CHURCH

A. Pastor Appreciation

It is recommended that each church have an annual pastor appreciation.

B. Regional and Local Church Internet Accountability

We, as a society, are experiencing an increase in the abuse of technology, including the internet, and we are cognizant of the increasing moral failures experienced by those in the ministry and the devastating impact of such failures. Therefore, the Great Lakes Region recommends that each local church and regional office and staff, install and maintain protective software, or other accountability measures, on all church or regionally owned internet-accessible devices. Pastors and ministry staff are **STRONGLY** encouraged to have similar accountability on all personally owned internet-accessible devices.