

Getting it all in one place

Right now your church's operational knowledge is in a spreadsheet somebody made in 2019, a folder on the last administrator's laptop, three people's memories, and a filing cabinet nobody has fully opened. Consolidating that sounds like a six-month project, which is why it never starts. It isn't. The first useful version takes about ninety minutes, and an incomplete register beats a perfect one you never began.

Before you start

The mindset that makes this possible. You are not building a complete record. You are building a **map**, and a map with blank areas is still a map — the blanks are the point, because they show you what nobody knows.

Three rules that keep it from becoming daunting:

1. **Never collect passwords.** You're recording where things live and who holds them, not the secrets themselves. That single decision removes most of the security risk and most of the anxiety, and it means you can do this in a normal room with normal people.
2. **Blank is an answer.** "We don't know who owns this" is real information and belongs in the record. Writing "unknown" is progress.
3. **Timebox it.** Ninety minutes now, another hour in a month. A project with an end time gets started.

Who owns it. One named person. The Discipline already assigns the charge conference's recording secretary custody of the church's records and reports (§247.4), and trustees hold the property side (§2533) — but for the operational map, name someone specific: usually the office administrator, or the pastor in a church without one.

What you'll need in the room. Last year's bank and credit-card statements, access to the church email inbox, and one other person who's been around a while. That's genuinely it.

The workflow

Phase 1 — Ninety minutes, from memory (do this first)

Sit down with one other person and write down what you already know. Don't look anything up yet; you'll lose the momentum.

- ☐ The accounts you can name off the top of your head — email, Facebook, bank, website, whatever the church uses.
- ☐ For each: who you *think* owns it, and who you'd call if it broke.
- ☐ The standing facts a newcomer wouldn't know: who opens the building, when the council meets, which week the newsletter goes out.
- ☐ Where the important documents physically are — the deed, the minutes, the insurance policy.

You will have gaps. Good. Write "unknown" and move on. **Stop at ninety minutes.**

Phase 2 — Follow the money

This is the step that finds what memory misses, and it's the most satisfying hour in the whole process.

- ☐ Go through twelve months of bank and credit-card statements line by line. Every recurring charge is an account somebody set up: the domain renewal, the streaming subscription, the design tool, the licensing fee.
- ☐ Search the church email inbox for *receipt, renewal, your subscription, invoice, welcome to*.
- ☐ Check the church's calendar and website footer for services nobody mentioned.

Nearly every church finds something in this phase that no living person remembered — and it's usually still being paid for.

Phase 3 — Ask everyone, briefly

Send one short email to staff and key volunteers. Long requests get ignored; this one takes ninety seconds to answer.

Subject: Two questions, 90 seconds

We're putting together one list of the church's accounts and where things live, so nobody has to reconstruct it from scratch later. Two questions:

1. What church accounts or logins do you use?
2. Is there anything you do that would be hard for someone else to pick up if you were away for a month?

Please don't send passwords — just names. Thanks.

— [name]

That second question is the valuable one. It surfaces the unwritten routines that make a church run, and people answer it honestly because it flatters nobody and blames nobody.

Phase 4 — Sort by what would actually hurt

Now you have a messy list. Order it once, and the rest gets easy:

- ☐ **Would we be locked out?** Accounts where the two-factor codes go to one person's phone. Fix these first — see two-factor codes that don't leave with the person.
- ☐ **Does it cost money?** Anything with a renewal date, so nothing lapses or quietly auto-renews forever.
- ☐ **Would a new person be stuck?** The routines and rhythms from Phase 1.
- ☐ **Everything else.** Genuinely fine to leave for later.

Phase 5 — Make it the normal way

A one-off cleanup decays within a year. Three small habits keep it alive:

- ☐ **New account, new entry.** Whoever sets one up records it the same day.
- ☐ **Someone leaves, someone checks.** Departure means walking the register: what did they hold, what moves, what gets removed.
- ☐ **Once a year, in the same month.** Ride along with the trustees' insurance review (§2533.2) or charge conference prep — it takes half an hour when it's current.

Who does what

Task	Owner
Holding the map	One named person — office administrator or pastor
Statement review	Treasurer or bookkeeper, with the record-keeper
Property, deed, insurance records	Trustees (§2533)
Charge conference records and minutes	Recording secretary (§247.4)
Asking staff and volunteers	Pastor or SPRC chair — it lands better from them
The annual check	Whoever holds the map

Variations

A church with a spreadsheet already. You're ahead. Don't retype it — start from it, then run Phase 2 anyway, because statements always reveal things the spreadsheet's author didn't know about.

A church with nothing at all. Also fine, and in some ways easier: no inherited errors to inherit. Do Phase 1 and stop. One page of what you know is a genuine improvement over nothing.

A church whose last administrator left abruptly. Start with Phase 2 — statements don't depend on anyone's memory. Then check whether the church can get into its own email; if not, that's the first phone call, and the recovery process is easier the sooner you start.

A church mid-pastoral-transition. Do Phase 1 with the outgoing pastor in the room, and do it in the spring rather than in June. Much of what you need is in their head and nowhere else, and they will happily tell you — nobody has ever asked.

A very small church. All of this is one person and one afternoon. Skip Phase 3 and talk to the two people who do everything.

A multi-point charge. Each church gets its own map. Shared accounts — often email or a website — get recorded in both, with a note saying they're shared, or the next transition will find each church assuming the other had it.

Elsewhere

- **Two-factor codes that don't leave with the person** — the fix for whatever Phase 4 turns up first.
- **Key log** — the physical half: who holds which key, and the rule about never writing down the code.
- **Maintenance schedule** — the building's rhythms, which belong in the same map.
- **Board of Trustees** — what the Discipline already requires them to keep track of, which is more than most boards realise.
- **Personnel policy skeleton** — where record retention and personnel files get their own rules.
- **Your annual conference archivist.** Conference commissions on archives and history are charged with helping local churches preserve their records (§641), and they are almost never asked. Yours may take your minutes off your hands entirely.

This is a starting point, not legal advice. Employment law varies by state, and your annual conference may have policies that go beyond the Discipline. Before you rely on anything here for a hiring, firing, or compensation decision, run it past your conference office or chancellor.

Paragraph references are to the 2020/2024 Book of Discipline. This document paraphrases; for the binding text, see the Discipline itself.

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