

CHURCH RECORDS CHECKLIST

A practical guide for keeping church information organized, accurate, and useful for ministry.

Church / Ministry: _____

Prepared by: _____

Date reviewed: _____

How to use this checklist

Review each section with your church secretary, ministry leader, or records team. Check an item when it is in place. Mark items that need attention and assign a person and target date. Adapt the checklist to your church's size, practices, and applicable privacy requirements.

1. People and family records

- A consistent record exists for each person who should be included in the church database.
- Names and contact details are reviewed for accuracy and duplicate entries.
- Family or household relationships are recorded where appropriate.
- A clear process exists for updating contact information and noting when information is outdated.
- Access to personal information is limited to people who need it for their responsibilities.

2. Membership and baptism

- Membership status and relevant dates are recorded consistently.
- Baptism records are stored in a way that authorized leaders can locate when needed.
- Changes to membership records are reviewed and documented according to church practice.
- Paper records and digital records, if both are used, are checked for important discrepancies.

3. Discipleship and pastoral follow-up

- Discipleship participation and progress are recorded only to the level needed for ministry.
- A responsible leader is identified for follow-up items when appropriate.
- Sensitive pastoral notes are kept separate from general administrative records and protected carefully.
- The church has a clear practice for correcting inaccurate or outdated information.

4. Attendance, activities, and ministry participation

- Attendance is recorded consistently for the gatherings or ministries the church tracks.
- Activity and event records include useful details such as date, activity, and responsible leader.
- Participation lists are checked for duplicate or misspelled names.
- Reports are reviewed for obvious gaps or data-entry errors before being used for decisions.

5. Reports and database health

- The church can identify which records are incomplete, duplicated, or out of date.
- Regular reports are reviewed by an authorized person.
- CSV export or another approved method is available when the church needs a working copy of its data.
- Exports are stored securely and are not left on shared or public computers.
- The church has a simple written process for correcting data and reviewing record quality.

6. Privacy, security, and continuity

- The church has identified who may view, edit, export, and manage records.
- Passwords and devices used for records are protected; shared logins are avoided where possible.
- Backups are made on a schedule appropriate to the system and church needs.
- A restore procedure is known and tested periodically where backup/restore is supported.
- Old exports and unnecessary copies are deleted securely when no longer needed.
- The church follows applicable privacy rules and explains its record-keeping practices when appropriate.

7. Monthly review and accountability

- A person is assigned to review record quality each month.
- Corrections and outstanding tasks are listed with an owner and due date.
- The team reviews whether current records help support member care and ministry administration.
- Procedures are updated when the church's needs or tools change.

Priority actions

Item to improve	Person responsible	Target date

Important: This checklist is a general planning aid, not legal advice or a guarantee of compliance. Adapt it to your church's context and applicable privacy requirements. Product features and procedures vary; verify what your current software and workflow support.

LocalFlow Church Database • Practical tools for church administration