

**Louisiana Conference  
Board of Ordained Ministry  
Policy Number 105  
CBOM Record Retention**

Guidelines from the General Council on Finance and Administration (Section XI – Retention and Disposition):

*Records and files should be actively maintained so long as, and only so long as, they are required for the personnel support and decision making of the annual conference. An officer should be designated by the annual conference as the custodian of its clergy personnel records. ...After consultation with the BOM, no materials deemed by the custodian to be significant for future evaluation of the practice of ministry shall be destroyed. Each conference may establish standards for what candidate records to retain and what records to destroy. Twenty-five years after a clergyperson retires or no longer has a relationship with the conference, the custodian may destroy the personnel file.*

All active CBOM files will be maintained in a lockable fire proof filing cabinet in the Louisiana Area Offices of The United Methodist Church in Baton Rouge.

All active DCOM files will be maintained in a lockable filing cabinet in the district superintendent's office or the current registrar's office.

After a candidate is ordained and/or received into full membership into the Louisiana Conference, their provisional membership file will be purged. The provisional process assignments will be destroyed. All other documents and correspondences within the file will be transferred as archived material into a lockable file cabinet for up to 25 years after a person retires or no longer has a relationship with the conference. Documents to be included are:

- Biographical data sheet and photo
- Criminal Background Check
- Consumer Credit Report
- Medical Report
- All psychological assessments
- CBOM Interview Response forms
- In-Parish visits
- Record of district committee actions
- Transcripts of all academic work
- Letters related to conference relationship, etc.

Archived CBOM files (provisional candidates being ordained and entering into full connection and local pastors who have completed the course of study) will be maintained in a lockable file cabinet in the attic of the Louisiana Area Offices of the United Methodist Church in Baton Rouge.

**Policy adopted by the Conference Board of Ordained Ministry on January 22, 2008**