

Keep or Bin...?

The Care of your Parish Records

Church of England
Record Centre
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Contents

- 1 Introduction
- 2 Why bother to manage your records?
- 3 Deciding what the parish needs to keep
 - 3a Church Services
 - 3b Church Buildings and Property
 - 3c Parish Administration
 - 3d Parish Finance
 - 3e Other records (unpublished)
 - 3f Parish Organisations
 - 3g Other records (published)
- 4 Looking after your paper records
 - 4a Creating and storing your records
 - 4b Protection and repair of your documents
 - 4c Allowing use of records
- 5 Looking after your electronic records
 - 5a General Advice
 - 5b Document Management Advice
- 6 Data Protection and information security
- 7 Retention Guidelines
 - 7a Church Services
 - 7b Church Buildings and Property
 - 7c Parish Administration
 - 7d Parish Organisations
 - 7e Legal Documents
8. Glossary of Administrative and Record Terms
9. Contacts

1 INTRODUCTION

Since 1978 with the passing of the Parochial Registers and Records Measure, the long-term care of parish registers and other important parochial archives has been covered by law. The 1978 Measure was brought up to date by the Church of England (Miscellaneous Provisions) Measure 1992, which came into force on 1st January 1993. A Guide to the Parochial Registers and Records Measure has been published¹.

This Guide is intended to provide some brief, practical notes to be used by the various parish officers who find themselves involved in managing records on behalf of the parish. The information in this leaflet has been taken from a number of sources including the Advisory Group of the Church of England Record Centre, the Council for the Care of Churches, Cheshire Record Office, Kent Archive and Local History Service, The National Archives and the Society of Archivists.

It is to the Diocesan Record Office, that parishes should look for advice and guidance on the care of record material, ancient or modern.

Paper copies of these guidelines are available from the Church of England Record Centre and details of our address can be found in Section 9 on page 19. Further copies can also be downloaded from our website: <http://www.cofe.anglican.org/about/librariesandarchives/>

2. WHY BOTHER TO MANAGE YOUR RECORDS?

There are a number of reasons why parishes need to manage their records properly. It is very important that the parish records are well managed particularly as many church activities are subject to external regulation for example in areas of child protection and accounting. This is especially true in the current climate where the volume of records (whether stored in paper or electronic format) can easily become overwhelming.

The main purpose of managing your records is to ensure that:
“the right information is with the right people at the right time.”²

If you have too many records then the important information can get buried; but if you can't find the information when you need it there is little point in keeping it in the first place. On the other hand, if records are destroyed before they need to be, then the parish may not have the information which is required to deal with issues that arise.

Managing the records detailed in the Parochial Registers and Records Measure 1978 is straightforward. These guidelines are designed to help parish officers to distinguish between the different kinds of records and decide how long and where they need to be kept.

3. DECIDING WHAT THE PARISH NEEDS TO KEEP

When the majority of older parish registers and records have been deposited in the Diocesan Record Office, most parishes will only be responsible for records of current administrative value. Although many of these will be of little or no historical value, it is important to be able to distinguish between these records and those which will be of historical value.

¹ *Guide to the Parochial Registers and Records Measure 1978 (as amended at 1st January 1993). With practical suggestions for custodians and users.* Church House Publishing, Great Smith Street, London SW1P 3BN. ISBN 0 7151 3747 6.

² Definition of records management by the Records Management Society of Great Britain
R:\DAC\Guidelines and Advice Notes\DAC - Keep or Bin - Records 2006 Final (2).doc

The purpose of this document is to give parish officers the confidence to distinguish between the records which ought to be kept permanently and those which may safely be thrown away when they are no longer required for administrative purposes. This advice applies equally whether the records are traditional paper records or have an electronic format.

For ease of reference records have been grouped into separate subject categories. The guidance about the retention or otherwise of records has been divided into three categories:

The parish **must keep**: This section contains the records which parishes are legally required to maintain whilst the records are in use and then to transfer to the Diocesan Record Office when the records have ceased to be of use in the parish.

The parish **may keep**: This section contains the records, which parishes may keep or may not; parishes are advised to consider keeping these records that may be of permanent interest, however the Diocesan Record Office may not be able to accept deposits of such records.

The parish **should dispose of**: this section relates to records, which may be safely disposed of at the end of their administrative life.

For ease of reference records have been grouped into separate subject categories.

3a Church Services

The parish **must keep**:

- registers of baptisms, marriages and burials - Permanent (deposit at the Diocesan Record Office)
- registers of banns, confirmations and services - Permanent (deposit at the Diocesan Record Office))

The parish **may keep**:

- registers of marriage blessings
- registers of funerals/interments
- an archive copy of any service sheets for special services or any surveys of church attendance
- photographs of special services, church events, clergy and congregation

The parish **should dispose of**:

- baptism certificate counterfoils, marriage certificate counterfoils, copies of burial certificates, copies of banns certificates and applications for banns or baptisms.

3b Church Buildings and Property

Churchwardens are required by the Care of Churches and Ecclesiastical Jurisdiction Measure 1991 (which came into force on 1st March 1993) to compile and maintain (in the form recommended by the Council for the Care of Churches) a terrier and inventory and a logbook giving details of alterations, additions and repairs to, and other events affecting the church or the articles or land belonging to it, and with a note of the location of any other relevant documents.

The churchwardens must send a copy of the inventory to the person designated by the bishop as soon as practicable after it has been compiled, and it would be wise also to send a copy to the Diocesan Registrar if they are not the designated recipient. They must notify the designated recipient of any alterations at intervals laid down by the Bishop.

The terrier and inventory and the logbook must be presented by the churchwardens to the parochial church council at the beginning of each year, together with a signed statement to the effect that the contents are accurate. Mention should be made of new items, losses or disposals.

The parish **must keep**:

- former terriers, inventories and logbooks - Permanent (deposit)
- faculties, and accompanying papers, photographs, plans and drawings - Permanent (deposit)
- plans, correspondence, accounts and photographs relating to major repairs or alterations - Permanent (deposit)
- reports by Council for the Care of Churches, English Heritage and other conservation organisations - Permanent (deposit)

The parish **may keep**:

- a logbook or scrapbook recording parish events³

3c Parish Administration

The core documents are the minutes of the parochial church council and its committees.

If these are still paper documents, but no longer written by hand in bound volumes, it is important that the signed copies of minutes are properly kept. It is recommended that PCC secretaries maintain minutes, produced by a word processor and kept in folders, by the standards outlined in the Company Secretaries handbook⁴. Advice about this can be obtained from your Diocesan Record Office.

Pasting or sticking typed copies in bound volumes is not recommended because of the generally unsound archival quality of glues and adhesives as well as the risk of breaking the spine of the binding. Care must be taken, too, with ring binders because of the metal parts, which may rust. Loose minutes should either be properly bound into volumes or kept in an archival box, in which case the pages should be consecutively numbered. For legal reasons it is strongly recommended that pages of minutes are not kept loose but are filed in meeting order in files which comply with the standards outlined in the Company Secretaries handbook.

The parish **must keep**:

- the signed copies of the PCC minutes and its committees and any accompanying papers and reports - Permanent (deposit)

³ These are very valuable records for ecclesiastical and social historians. It is strongly recommended that all parishes maintain some similar type of document, and the form of logbook published by the Council for the Care of Churches allows space for this.

⁴ The Company Secretary's Handbook A Guide To Duties and Responsibilities, 3rd Edition by Helen Ashton, publisher Kogan Page, ISBN 0749441194. See sections 5 – 6 which give guidance about good record keeping practice.

The parish **may keep**:

- letters and reports relating to major developments in the parish if they contain important information
- an archive copy of questionnaire returns
- any statement as to the conditions, needs and traditions of the parish (a 'parish profile') produced by the parochial church council under the Patronage (Benefices) Measure 1986 on a vacancy in the benefice, as well as other documents held for or on behalf of the parochial church council or churchwardens in relation to the vacancy and the appointment of the new incumbent
- maps of the parish specially prepared for church purposes
- church electoral rolls and parish audits
- an archive copy of all printed items, such as booklets, produced by the parish.
- an archive set, preferably bound, of all parish magazines
- an archive set of the weekly notice sheets if the parish does not produce a parish magazine or if the weekly notice sheets contain information of long-term interest

All these documents should be dated.

The parish **should dispose of**:

- correspondence and other records relating to routine parish administration

3d Parish Finance

Most parishes generate a considerable quantity of financial records, but not all of these need be kept permanently.

The parish **must keep**:

- the annual accounts of all parochial church council funds – Permanent (deposit)⁵

The parish **should dispose of**:

- other supporting documents, including cash books, bank statements, wages records, vouchers and routine correspondence (more than 7 years old)
- planned giving and gift aid records (more than 7 years old)

3e Other Records (unpublished)

In most parishes the clergy will keep records dealing with pastoral matters many of which are likely to be highly confidential. It is recommended that these are disposed of once the matter has been resolved or when the incumbent leaves the parish, in line with data protection recommendations. If these records are being retained for research purposes, such a purpose should be included in the Data Protection notification, if there is one and if deposited in the Diocesan Record Office a closure period of at least 85 years must be applied to the records from the date of the most recent document on the file.

The same rules should be applied to any confidential papers relating to the selection of any new incumbent for the parish.

⁵ The Archbishops' Council's Finance Department has produced a parish account book entitled *Parochial Church Accounts*, in a loose-leaf format which provides for the inclusion of audited accounts.

In most cases the parish records fall clearly into a category in which they either have to be retained or may be destroyed after they have ceased to be current. However, there are a small number of records where historical value is limited but the bulk is considerable. In such cases it is permissible to retain a representative sample of the records, the sample to be determined by the parish in consultation with the Diocesan Record Office.

The parish **may keep**:

- public notices
- rota duty lists
- routine correspondence

Some of these are records which have been outlined for destruction in the advice given above. If it is decided to sample these records then the basis for the sample must be determined at the outset and rigidly adhered to. A good basis for sampling is to keep all records in the sample categories for a fixed period, eg one month in every year, or one year in every ten. Where doubt exists your Diocesan Record Office will be able to advise. It may be appropriate to transfer the whole series to the Diocesan Record Office in order to allow the archivist to take an appropriate sample.

3f Parish Organisations

Where separate organisations in the parish maintain their own records they should manage their records against the guidelines outlined in 3a-3e above.

3g Other Records (published)

The parish **may keep**:

- a copy of all printed service books, communion booklets, Bibles etc. as they are replaced by new versions
- finely bound altar and desk editions of the *Book of Common Prayer* and of the *Bible*⁶
- one copy of hymn and prayer books and psalters, service sheets and communion booklets [these are of value for the study of liturgy in the parish]

4 LOOKING AFTER YOUR PAPER RECORDS

4a Creating and storing your records

Taking trouble from the moment records are created is always important. It is useful to give some thought as to the length of time which a record will need to be retained. The guidelines above (3a-3g) together with the retention schedule in section 7 for this purpose can be useful. If a record is likely to be retained permanently (for example, it is of historical or legal value) it may be appropriate to use an archival quality paper, to limit the use of post-it notes on the text, to use brass paper clips or brass staples for securing papers, not to use sellotape to "mend" papers and not to use tippex on documents. All these precautions will extend the life of the file.

⁶ Since the coming of Common Worship and more versions of the scriptures, some are no longer in regular use. They are, however, of value and should be kept safely in the vestry. Some dioceses have a repository for them.

However, it would be an over-reaction (not to mention expensive) to apply these rules to routine financial information, for example, or general correspondence files which will be retained for much shorter periods of time.

Avoid using cheap brown paper, envelopes or newspaper for wrapping up records. Coloured or recycled paper is not suitable for records which are likely to be retained as permanent archives, and good quality pen ink should be used in preference to pencil or ballpoint pen.

Avoid metals that can rust in all clips, pins, staples, tags and containers. Rust destroys documents. Brass, plastic and other non-rusting paper clips can be obtained. When tying bundles use white tape rather than string, and string rather than rubber bands, which perish and damage paper. Wrap bundles in strong white paper before tying.

Keep documents free from dust, grease and other foreign substances.

Registers and other vital documents are required to be stored in a safe which should be located in a secure, cool and dry place. Avoid basements and attics for this purpose as these are likely to suffer from dampness or high temperatures. However, the records should not be stored in the same place as the candles, wafers, wine, ink, oil grease or articles made of cloth as these potentially attract pests. If the safe is damp, it is advisable to put some moisture absorbent silica preferably silica gel in the safe to help maintain suitable humidity levels. Safes should also be regularly aired to prevent damp or mould occurring.

Make sure that documents are protected from immediate contact with metal, in cupboard walls, shelves, trays and the like. Make sure that the records are packed in boxes and not in polythene bags. Polythene bags prevent vital air circulation and can also give off gases harmful to paper.

Make sure that records are packed loosely in the boxes. The tighter the boxes are packed the more likelihood that insect infestation and physical damage may result. Loose documents should be put in boxes of archival quality⁷. Make sure that books placed upright on shelves are firmly supported, if necessary by rigid shelf dividers.

Black and white photographs are better for long term archival preservation than coloured photographs, which tend to fade within a few decades and negatives are especially important as they can be easily used for making copies.

Faxes not on plain paper fade rapidly and also the chemicals present in many fax papers cause discolouration in adjacent papers- should be replaced if not on plain paper with photocopies at the earliest opportunity.

Do not place documents at ground level or where leaking water pipes could cause damage. If the area is prone to floods, store well above the known highest flood level.

Check all electrical circuits have been tested during the last two years. Keep a carbon dioxide fire extinguisher nearby. Use a liquid fire extinguisher only in the last resort.

If you need advice about storing parish records or about the environmental conditions in which your records are currently stored please contact your local Diocesan Record Office.

⁷ The Diocesan Record Office can advise about these.

4b Protection and repair of your documents

Records face deterioration through the direct causes such as fire and flood, but usually much more so from more indirect causes such as aging of their component materials and from excessive handling from over use. This section sets out the steps you can take to protect your records and if necessary where you can seek advice and help.

If the documents are in a bad condition, or in case of damage by fire or flood, get in touch with the Diocesan Record Office as soon as possible, where they can be repaired. Protect weak documents first with white blotting paper, and then place them within stouter covers. Do not bring any abrasive material such as metal bulldog clips into immediate contact with a fragile document. Do not attempt to dry sodden documents. Store them in a plastic bag in a domestic freezer if no immediate advice is available from the Diocesan Record Office.

Do not attempt any type of repair. Repairs need to be carried out under the direction of those with professional expertise. Materials likely to be at hand, such as mass-produced gum or glue, and the transparent self-adhesive strips intended for packages and parcels, and also said to be suitable for repairing printed books, must not be used on any documents, for they themselves in time cause damage. Natural decay can often be arrested, and, in part, made good by a trained document repairer: to patch with these mass-produced materials can destroy the original beyond repair.

If a document is damp and smells of mould, isolate it and place it in a natural current of cold dry air. Seek advice as soon as possible, as the mould may still be active. For general advice on conservation see the National Archives web site:

www.nationalarchives.gov.uk/preservation/

4c Allowing use of records

To avoid blots and smudges which can obscure the original text, make sure that no-one who uses core records for research purposes uses anything but pencil. It is also important that no one using core records for research purposes, eats, drinks or smokes whilst at work and that the notebook or the writing paper is not put on the records.

5 LOOKING AFTER YOUR ELECTRONIC RECORDS

5a General Advice

Whilst computers have made parish administration much easier electronic records need to be subject to the same rules of management particularly in regard to retention and destruction as traditional paper records.

It is recommended that records which are of permanent historical value are not stored on magnetic media but in hard copy format. Magnetic media can be corrupted and it is better to capture the permanent copy early on in the life of the document (it is recommended that this is done as soon as the final document has been completed).

Even records stored on CD/R or DVD media can be subject to corruption although this is a better option than many.

It is recommended that all computer systems which are used to create and maintain electronic documents in the course of parish administration are backed up on a regular basis. The back up discs should be stored securely away from the location of the machine or system on which they were created, in another room or ideally in another building.

All computers should have appropriate virus checking software, especially if documents are transferred between a number of computers.

It is also advisable for parishes to ensure that any data they create on a computer system will be compatible with the next system which is purchased. Otherwise significant re-keying or loss of data may occur.

Many parishes maintain parish web sites. If the technical expertise is available it is of value to take a snapshot of the parish web site twice or three times a year (depending on how frequently the web site is updated). All master documents made available via the web site should be captured in hard copy format in the same way as other records stored on magnetic media.

5b Document Management Advice

Naming Files

All individual documents should carry an identifying document name which in conjunction with the folder name should clearly indicates what it is. For example

Minutes - name of the group or committee and meeting date in a recommended format (dd.mm.yyyy).

Reports – name of the report, date and version number.

Filenames – add the filename and path to the footer of every document you create once it has been saved, to enable any one with a hardcopy to identify where it came from and what it is.

Naming Folders

Folders should carry a readily identifiable name which indicates their purpose. Try to put the majority of documents into global or shared folders and have a clear policy on folder names.

Consider:

- Is there a recognised term for the subject? Use this in preference.
- Is the term likely to be recognised in the future? Try not to use current buzz words which may have passed out of use in the future when the folders have not.
- Try not to use abbreviations unless they are very obvious.
- Can a complete newcomer understand the subject from the folder name and find the information quickly using the folder name?

Structuring

Within shared folders, create individual folders for each subject. If there are a large number of files in a folder it is difficult to find specific information. Use additional folders to structure this as a hierarchy – general subjects first, and folders become more specific as you move down the hierarchy.

Version Control

Where a document goes through a number of changes and earlier copies are kept, it is essential that version control is applied. This can be of two types.

- Version 0.1, 0.2 – where small changes are being made to an existing document.
- Version 2, Version 3 – where a major revision is made and a new revised version will replace an earlier version.

The version information should appear in the file name and on the front page of the document (e.g. Mission Policy – Final Version – 2006). Consider whether you want to retain or delete earlier versions?

Security

Global or shared folders may contain sensitive information, the use of which requires to be restricted. There are two ways to set up protection on these folders.

- If the technical support is available, arrange that some folders on a global or shared drive can only be accessed by certain individuals.
- Individual parish officers can set up password protection. Only individuals entitled to have access will have these passwords.

It may be worth organising a short training seminar for parish officers on ways to protect sensitive information.

Record Retention

Review files and folders regularly to ensure you don't end up with huge amounts of information you seldom use. If a file exists electronically, consider: is it still being used, and if not how long should it be kept? You can create a folder for archive information, or place such items on disc or CD-Rom and keep this as an archive file.

Putting information on the same subject together on a single CD-Rom or disc makes it easy to find when requested, and easy to delete when it is no longer required. However, make sure that all parish officers know where they are kept and what 's on it.

If you are intending to keep the information or documents for a number of years, consider whether the electronic format will be accessible – it is probably better to print everything onto archival quality paper and retain it on an archival quality file, or else get all the documents microfilmed and keep the record in this way. Both approaches will require some indexing. There is a risk of archiving onto media that later becomes obsolete.

There are often good statutory or best practice reasons for keeping information for a specific periods of time, so don't make unilateral decisions you may have to justify later. Develop a records retention schedule which lists records that should be retained, preferably by activity or function using sections 3a – 3g of these guidelines as a template.

Regularly review and delete documents which don't need to be kept. Keep an Excel spreadsheet listing what has been deleted –it can be part of an indexing system for all records both paper and electronic and will greatly assist answering any future enquiries concerning the records.

E-mail

There needs to be a clear policy to ensure that e-mail when used as a formal means of communication are treated as such. Make clear how e-mails should be archived if required and that the record retention schedule include reference to e-mails within the subject folders or shared drives. E-mails containing significant decisions or discussions should be retained if the substance of them is not contained in more formal electronic documents.

6. DATA PROTECTION

As most parishes collect personal information they are subject to the Data Protection Act 1998. Not-for-profit organisations are not required to notify the Information Commissioner of the personal data they are processing unless they wish to. There is an annual fee of £35.

However, whether the parish chooses to notify the Information Commissioner or not it is still subject to the eight data protection principles and must manage all personal data against these principles.

Your Diocesan Office or website may provide detailed guidance concerning how the legislation applies to parishes and a good example of such guidance being available over the Internet is that given by the Diocese of London: www.london.anglican.org/Regulations/data-protection.html

7. RETENTION GUIDELINES

This section sets out the retention advice given in Sections 3a – 3g in the form of a table and follows the same order of record groups.

The following retention guidelines give suggested minimum periods for keeping each type of parish record less than 100 years old. If you are in any doubt please contact Archives and Local History Service for advice.

Key:

Permanent (deposit)	Important material which needs to be kept permanently. It is acceptable to deposit originals with the Diocesan Record Office and keep photocopies for parish use.
Destroy	Ephemeral material which can be discarded once its purpose has been served. Do not destroy if there is any possibility that the document may be required as evidence.

Review/Sample Material where a proportion needs to be kept, either by reviewing its value after an agreed period, or by taking a sample. Where it is appropriate transfer the whole record series to the Diocesan Record Office to allow the archivist to take an appropriate sample.

7a Church Services

Basic record description	Keep in parish	Final Action
Baptism, marriage, burial, and confirmation registers	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Banns registers	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Service Registers	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Orders of Service	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Baptism certificate counterfoils; marriage certificate counterfoils; copy burial certificates; applications for baptisms or banns	Last entry + 2 years	Destroy
Intercession lists	Last entry + 5 years	Review/Sample

7b Church Buildings and Property

[see also Legal Documents]

Basic record description	Keep in parish	Final Action
<i>Church, furnishing and contents</i>		
Faculties, citations and accompanying records	Last action + 5 years	Permanent (deposit)
Terrier and inventory, logbook	Last action + 1 year	Permanent (deposit)
Architects' Quinquennial reports	Last action + 5 years	Permanent (deposit)
Reports by Council for the Care of Churches, English Heritage and other conservation organisations	Last action + 5 years	Permanent (deposit)
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the church	Last action + 5 years	Permanent (deposit)
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy

Basic record description	Keep in parish	Final Action
Organ specifications, contracts, papers	Last action + 5 years	Permanent (deposit)
<i>Parsonage House</i>		
Plans, photographs, drawings	Last action + 5 years	Review for possible deposit
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the parsonage house	Last action + 5 years	Review for possible deposit
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy
Quinquennial reports	Last action + 5 years	Review for possible deposit
<i>Churchyard</i>		
Plans, registers of graves, faculties, citations and accompanying records	Last action + 5 years	Permanent (deposit)
Agreements concerning maintenance of churchyard, graves and memorials	Last action + 5 years	Permanent (deposit)
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the churchyard	Last action + 5 years	Permanent (deposit)
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy
<i>Church Hall</i>		
Plans, architects' reports	Last action + 5 years	Permanent (deposit)
Music, dancing and P.R.S. licences	Last action + 5 years	Review/Sample
Agreements for use of hall	Current year + 6 years	Review/Sample
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the church hall	Last action + 5 years	Permanent (deposit)
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy

7c Parish Administration

Basic record description	Keep in parish	Final Action
<i>Incumbent and other ministers</i>		
Institutions, admissions, licences	Current year + 6 years	Review for possible deposit
Correspondence concerning appointments	Last action + 5 years	Review/Sample

Union of Benefice papers, pastoral schemes and orders; plurality orders; documents establishing team or group councils; Joint PCCs or District Church Councils, and relevant papers and correspondence	Last action + 5 years	Permanent (deposit)
Ministers' papers relating to major parish developments or parish audits	Last action + 5 years	Permanent (deposit)
Ministers' correspondence and other papers on routine administration	Current year + 3 years	Destroy
Maps of parish boundaries, street lists	Last action + 5 years	Permanent (deposit)
Copies of replies to questionnaires or important circulars	Last action + 5 years	Permanent (deposit)
<i>Parochial Church Councils, Team and Group Councils, District Church Councils, etc; Churchwardens and other parish officers</i>		
Minutes of Council and Committees, Parochial Church Meetings, and Meetings of Parishioners for Appointment of Churchwardens	Last action + 5 years	Permanent (deposit)
Electoral Rolls	Last complete review + 6 years	Review/Sample
Parish profiles on vacancy in benefice	Last action + 5 years	Permanent (deposit)
Visitation papers	Last action + 5 years	Permanent (deposit)
Copies of replies to Articles of Enquiry	Last action + 5 years	Permanent (deposit)
Parish magazines	Last action + 5 years	Permanent (deposit)
Parish histories, scrapbooks, newspaper cuttings, brochures, record of gifts, photographs	Last action + 5 years	Permanent (deposit)
Sequestration records	Current year + 6 years	Review/Sample
Visitors' books	Last entry + 3 years	Destroy
Routine correspondence	Current year + 3 years	Destroy
Copies of circulars sent by other organisations, non-local material	Current year + 1 year	Destroy
<i>Parish Finance</i>		
Annual audited accounts	Current year + 6 years	Permanent (deposit)
Cash books, bills, vouchers, bank statements, other subsidiary financial records	Current year + 6 years	Destroy
Planned giving schemes	Current year + 6 years	Destroy unless anonymised
Insurance policies – employers' liability	Current year + 40 years	Destroy
Insurance policies – other than employers' liability	Current year + 6 years	Destroy
Church Copyright Licence information	Current year + 6 years	Review/Sample

Other records		
Accident reporting sheets or book – if relating to adults	Date of incident + 7 years	Destroy
Accident reporting sheets or book – if relating to children	DOB of the child + 25 years	Destroy
Criminal Records Bureau checks	as per Diocesan recommendations	Destroy

7d Parish Organisations

Basic record description	Keep in parish	Final Action
<i>Parish organisations – Mothers' Union, Youth Clubs, choir, bell-ringers etc</i>		
Minutes, reports, accounts	Last action + 5 years	Permanent (deposit)
Membership lists	Last action + 5 years	Destroy
Correspondence and contracts	Current year + 6 years	Review/Sample
Choir register	Current year + 3 years	Review for possible deposit
Music lists	Current year + 3 years	Review/Sample

7e Legal Documents

Basic record description	Keep in parish	Final Action
Deeds, statutory documents etc; title deeds, other documents relating to title, acquisition, disposal, or rights over a property; statutory notices, orders etc, including Orders in Council for closure of churchyard; and relevant correspondence	For all documents in this category, consult the Diocesan Registrar	Permanent (deposit)
Charities: deeds, schemes, orders, minutes, accounts, distribution lists, benefactions	Consult Trustees' Solicitor	Permanent (deposit)

8 Glossary of Administrative and Record Terms

Archive – (1) To permanently retain records that are of value for legal, constitutional or historical purposes.
(2) A place for keeping records permanently.

Benefice – is the church office held by the clergy and by reason of its historical origins or the result of statutory provisions can be termed a rectory or vicarage.

Data Protection - The law protecting the privacy of individuals by regulating access to confidential information held on them by both private and public organisations. The current Legislation is the Data Protection Act, 1998.

Electronic Records – Any recorded information created received and maintained in electronic format by an organisation or individual in the course of its activities.

Electronic Records Management - A digital environment for capturing electronic records and applying standard records management practices. Electronic Records Management supports the medium to long term information management needs of business.

Faculties – A document issued by the Bishop's Chancellor, authorising additions or alterations to consecrated buildings and lands and their contents. A faculty is normally issued after consultation with the Diocesan Advisory Committee.

Finding Aids -Indexes, schedules, subject thesauruses and referencing systems which structure and identify information to enable its easy retrieval.

FOI (Freedom of Information) -The law regulating public access to official information held by public bodies as defined in the schedule of the Act. This law does not apply to parish records, except marriage registers dated after 1837, which technically belong to the Registrar General of Births, Deaths and Marriages.

Functions -The service objectives of the activities of the record creator and the use for which its record series was created to support. It is important to establish the functions which records are created to support particularly as in most institutions organisational change is common and can lead to records and records creators being split.

Incumbent – The priest in charge of a parish whether as Rector, Vicar or Priest in Charge.

Institution /Induction – The first is admission of a new incumbent into the “spiritualities” or pastoral responsibilities of a benefice. Followed by the induction which is admission of a priest into the possession of the “temporalities” of a benefice including the church.

Interregnum – The period between the resignation of an incumbent and the admission of a successor.

Parish – Is the geographical area entrusted by a bishop to a priest who has the responsibility for the care of the souls within it.

Parochial Church Council – A body of lay persons, elected at the Annual Parish Meeting, who together with the incumbent, licensed clergy, the churchwardens, ex officio and co-opted members (if any), are responsible for the initiation, conduct and development of the Church's work within the parish, and outside, whereby the whole mission of the Church is promoted.

Parochial Registers and Records Measure – Is the legislation which regulates the care of parish registers and parochial archives. The 1978 Measure was amended by the Church of England (Miscellaneous Provisions) Measure, 1992. A *Guide to the Parochial Registers and Records Measure 1978 (as amended at 1st January 1993)*. With practical suggestions for custodians and users is obtainable from Church House Publishing, Great Smith Street, London SW1P 3BN. ISBN 0 7151 3747 6.

Records – Recorded information (documents) regardless of form or medium created, received and maintained by an agency, institution, organisation or individual in pursuance of its legal obligations or the transaction of business.

Quinquennial Inspection – The survey of the church fabric undertaken every 5 years by an architect or surveyor approved by the Diocesan Advisory Committee. The report will make recommendations categorised in varying terms of urgency and cost.

Records Management - The procedures and practices employed to structure, control and regulate records whatever their medium, electronic, paper or microform. The management of records ensures efficiency and economy in their use, storage and disposal and the selection of those of value for permanent preservation.

Register – Books in which details of services, baptisms, confirmations, marriages and burials are kept.

Retention Schedules/Instructions - A retention schedule is an analytical list of record series, arranged either under the functions carried out by the creating organisation or under structural headings of a departmental organisation. The main purpose of the schedule is to record and implement the appraisal decisions which have been made, so that these decisions can be routinely put into effect. A secondary purpose may be to set out a list of the records series in a way which will illustrate the organisation's activity.

Series - A basic unit of the administrative control of records and an organised group of records that are created to serve a common function derived from a particular administrative process. Series can be any size. Some are very large such as a series of PCC minutes or just a few files relating to Visitations.

Sequestration – The financial management of the parish during an interregnum including the staffing of Sunday and other services, collecting the fees which would have been payable to the incumbent or benefice and the care and maintenance of the parsonage house. The sequestration accounts are submitted to the diocese at the end of the interregnum.

Terrier/Inventory – The detailed list of land, goods and ornament belonging to the parish church.

Visitation – The periodic visit to inspect the temporal and spiritual affairs of the parish carried by the Bishop or the Archdeacon. Records created by a visitation for example include the Articles of Enquiry.

9 Contact details:

Church of England Record Centre

Address: 15 Galleywall Road, South Bermondsey, London SE16 3PB

Tel: +44 (0)20 7898 1030

Fax: +44 (0)20 7394 7018

E-mail: archivist@c-of-e.org.uk

Website:

<http://www.cofe.anglican.org/about/librariesandarchives/>

Church of England, link to individual diocesan websites

Website: <http://www.cofe.anglican.org/links/dios.html>

Information Commissioner

Address: Information Commissioner's Head Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF.

Fax: 01625 524 510

DX 20819

Helpline

Tel: 01625 545 745

Fax: 01625 524 510

E-mail: mail@ico.gsi.gov.uk

Website: <http://www.ico.gov.uk/eventual.aspx>

National Archives, Archon directory of record repositories in the United Kingdom

Website: <http://www.nationalarchives.gov.uk/archon/>

Records Management Society

Address: Records Management Society, Woodside, Coleheath Bottom, Speen, Princes Richborough, Buckinghamshire, HP27 0SZ.

Tel: 01494 488566

Fax: 01494 488566

E-mail: info@rms-gb.org.uk

Website: <http://www.rms-gb.org.uk/>

Society of Archivists

Address: Society of Archivists, Priorsfield House, 20 Canon Street, Taunton, Somerset, TA1 1SW

Tel: 01823 327030

Fax: 01823 271719

For general enquiries and information email:

societyofarchivists@archives.org.uk

Website: <http://www.archives.org.uk/>