

Save or Delete...?

The Care of Diocesan Records

Church of England Record Centre
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1 INTRODUCTION

Further copies of these guidelines can be downloaded from our website:

<http://www.cofe.anglican.org/about/librariesandarchives/>. Paper copies are also available from the Church of England Record Centre and details of our address can be found in Section 12.

2 STRATEGIC IMPORTANCE OF MANAGING YOUR RECORDS

There are a number of reasons why dioceses need to manage their records properly. 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 primary purpose of managing records is to meet the operational needs of the organisation to enable it to carry out its functions effectively. It is strongly recommended that one member of staff is responsible for co-ordinating the management of the records created by the diocesan administration and that they liaise with the Diocesan Registry and the Diocesan Record Office (DRO) and can provide a central point of reference for any queries. Consequently good record keeping and ensuring the back up of vital information should form an important part of the diocese's business continuity plan.

The Church also has theological reasons for managing its records. Firstly as a testimony of its various activities as part of its continuing witness to Christians, those of other faiths and those of none. Good record keeping is part of the Church's wider accountability to Society in relation to a wide area of responsibilities examples include demonstrating compliance to child protection regulations and its commitment to preserving its historic churches. The records that are kept ideally should reflect the true complexity and diversity of the Church's activities.

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 diocese may not have the information which is required to deal with issues that arise.

The records created by the diocesan administration are subject to a range of external regulation including the Charity Commission, Office of the Information Commissioner and many pieces of individual legislation. However in several areas of diocesan administration, for example the records created by diocesan outreach activities, there is no formal legislation governing the retention of records and in these cases this guide offers recommended periods of retention.

These guidelines are designed to help diocesan officers to distinguish between the different kinds of records and decide how long and where they need to be kept. The retention periods given in these guidelines are

based on either on legislation or on recommended good practice. These guidelines should be applied to all records whether in a traditional paper or in an electronic format.

3 LOOKING AFTER YOUR ELECTRONIC RECORDS

3.1 General Advice

Whilst information technology has made diocesan 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 dioceses routinely tackle the preservation of electronic records which are of permanent historical value. It is not recommended to store such records on magnetic media but only in hard copy format in the absence of a supported electronic archive or document management system. 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 IT systems which are used to create and maintain electronic documents in the course of diocesan administration are backed up on a regular basis. The back ups should be stored securely away from the location of the machine or system on which they were created, ideally in another building or at the least, in a different room in the same building.

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

It is also advisable for the dioceses to ensure that compatibility of existing data is addressed when buying and installing new computer systems. Otherwise significant re-keying or loss of data may occur.

All dioceses now maintain web sites. If the technical expertise is available it is of value to take a snapshot of the diocesan 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.

3.2 Document Management Advice

(a) Naming Files and folders

All documents (e.g. a report or spreadsheet or powerpoint presentation) in Microsoft Office called “files” and are stored in “folders”. You should have a clearly structured arrangement of all your folders which is fully documented. You can give names to files and folders and the combination of file and folder name should clearly indicate the subject content. For example:

Minutes - name of the group or committee and meeting date in a recommended format (yyyy.mm.dd) e.g. “DAC Minutes 200708.doc” or “DBF minutes 200802.doc” rather than “May.doc”. Having year then month in number format in the file title means any file list on screen will be in a helpful and logical order. Store minutes in appropriately named folders e.g. DAC Minutes 2007 or DBF Minutes 2008.

Reports – name of the report, date and version number if applicable e.g. “Diocesan Board of Finance Annual report 2007.doc.v1”

Filenames – add the filename and filepath to the footer of every document you create once it has been saved, to enable anyone with a paper copy to identify what it is and where the electronic copy can be found.

Folders should carry a readily identifiable name that indicates their purpose. The default should always be to put 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 for 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?

(b) Storing Files - Folders

Within shared drives create individual folders for each activity or function. If there are lots of files in a folder it can be hard to find specific information. Use additional folders to structure this as a hierarchy – general activities first, then more specific folders and files as you move down the hierarchy. If you already have a paper filing structure that people are familiar with then look at replicating that for your shared folders rather than trying to create something new. Put yourself in the shoes of someone trying to find a document in the future who is not familiar with the files: what folder and file titles will make it easiest for them to find the right document or file?

(c) Version Control

Where a document goes through a number of changes and earlier copies are kept, it is essential that version control be 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 Final – where a major revision is made and a new revised version will replace an earlier version.

Doing this will make it easier to track changes as a document develops. The version information should appear in the file name and on the front page of the document (e.g. Mission Policy – Version 3 Final – 2006). Consider whether you want to retain or delete earlier versions. If a version represents a significant change in policy, thought or expression from its predecessor, and vice versa it should be retained.

(d) Styles

Always structure documents using Word styles. They make it easy to format documents and maintain consistency throughout them, particularly standard ones such as letters, reports, minutes etc and enable simple shared reviewing and editing as everyone uses the same formatting and structure. Document sharing e.g. for comment and editing, is much easier to achieve in Word 2003 and later versions by using the “Routing” feature.

(e) Security and Access

The greatest risk to your records is misplacement, loss and unauthorised access. Consequently it is vital that you properly control access to and use of your records. Store documents on shared drives so that they can be readily accessed by colleagues – better one copy in a shared drive than several all in personal drives or folders. Where necessary, access to shared folders can be limited to those who have a need to access the contents. This can be done on a folder by folder basis. Alternatively an individual document can be password protected; though if you forget the password, recovering the contents may be extremely difficult.

(f) Retention and Deletion

Shared folders are just like filing cabinets – they take up space and cost money. The difference is that you cannot see the space – but you still need to clear them out and weed them in exactly the same way you would a filing cabinet. You need to have a clear policy on what you keep and for how long. For specific guidance about the retention or disposal of records not included in this guide and in the absence of a diocesan policy, please contact the Record Centre for further advice, Tel. 020 7898 1030 or e-mail: archivist@c-of-e.org.uk.

(g) Back Ups

It is essential to make regular back ups and anything saved to a shared folder on your servers is usually backed up regularly by your IT department and can be recovered in the event of a problem with your

systems. Avoid saving only onto local (i.e. C or D) drives or plug in drives such as memory sticks or flash drives – it isn't safe or secure! Obviously this will sometimes be unavoidable – so do transfer files to a shared folder on the server as soon as possible.

(h) E-mails

Naming email – always use the “subject” box to give a proper title to the email that describes what it is about. Limit each email exchange to one clear subject wherever possible – do not reply to a previous email to start a new topic, instead start a new email with its own clear subject heading.

Saving email – Work related e-mails you need to keep as part of the corporate information of the diocese should be treated in the same way as any other electronic or paper record and stored in a way that provides security and access to those who need it.

Saving emails can be done in two ways –

a) within Outlook as a “live” email. While this retains the flexibility of access and use - you can forward it, reply etc. and can store emails in various sub-folders the disadvantages are that they are only accessible to you, unlike information stored in shared folders and will over time clog up your email inbox making it harder to manager the information. Email is also not a satisfactory means of long term storage of important information.

b) Outside of Outlook. Content of emails that need to be saved longer term can be stored outside the email system by saving the email in message file (use the “save as” option and choose “Outlook Message Format” in the save as type field) in a shared folder under the appropriate subject heading – this saves the email text as a document with the to/from/date details intact and allows it to be stored with related documents. The actual email can then be deleted. In a Microsoft Windows environment, such e-mails can be simply dragged from Outlook to the appropriate folder.

A ‘print to file’ policy for e-mails is not recommended. While a record is retained the original format is not preserved, its flexibility and usability are much reduced and their content can only be shared in essentially electronic working environment by being scanned back into an electronic system.

(i) Dates

Always date documents. Do not use the “date” field option as it enters the current date and automatically updates every time the document is opened.

(j) Master Copies

The master copy of any document or file should be the creating department or the main contributor to its creation. Decide who is the master copy owner – they are responsible for ensuring a complete set of records e.g. of a series of meetings, so that the organisation has a set so that everyone else can dispose of theirs and not have to keep their own duplicate copies. This applies to paper as well as electronic records.

4 LOOKING AFTER YOUR PAPER RECORDS

4.1 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. These guidelines together with the retention schedule in section 10 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 avoid the use of post-it notes on the text, to use brass paper clips or brass staples for securing papers, not to use self-adhesive tape to “mend” papers and not to use tippex on documents. All these precautions will extend the life of the record.

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

Good Practice

Avoid using 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. Many metals corrode and cause damage to 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.

Storage

Registers and other vital documents should be stored in a safe or in lockable fire resistant filing cabinets 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 stationery and general office supplies but in clearly designated areas from which they can be easily retrieved and where they can be safeguarded from fire, flood, theft or unauthorised access.

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 rather than plastic bags. Plastic bags prevent air circulation and can also give off gases harmful to paper.

Do not place documents at floor 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 diocesan records or about the environmental conditions in which your records are currently stored please contact your local DRO.

As part of the business continuity planning it may be worth considering have a contract with a document salvage company for the recovery of records in the aftermath of a major incident such as a flood or fire.

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

Advice about appropriate conditions for the storage of records can be found on the University of Edinburgh Records Management Section website:

<http://www.recordsmanagement.ed.ac.uk/infostaff/rmstaff/recordstorage/recordstorageareas.htm>.

4.2 Protection and repair of your documents

Records face deterioration through the direct impact of fire and flood, but usually much more so from more indirect causes such as aging of their component materials and from inappropriate handling. 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 poor condition, or in case of damage by fire or flood, get in touch with the Diocesan Record Office (the "DRO") as soon as possible, where they will be able to offer advice and assistance. Protect damaged documents first with white blotting paper, and then place them within folders. 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 until advice is available from the DRO or document salvage company.

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.

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: <http://www.nationalarchives.gov.uk/preservation>

4.3 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 a soft-leaded pencil. It is also important that no one using core records for research purposes, eats, drinks or smokes whilst anywhere near your records and that any notebook, laptop or writing paper is not put on top of the records. Encourage the use of reading aids such as foam wedges and weights. Researchers need to be directly supervised to avoid the risk of damage or loss.

5 DATA PROTECTION

The purpose of the data protection legislation is to prevent wrong decisions about people being based on inaccurate data and unauthorised use of personal information. The Data Protection Act 1998 (the “1998 Act”) give individuals the right to know what information is held about them and provides a frame work to ensure that personal information is handled properly.

All dioceses collect personal information. They are subject to the 1998 Act and the DBF and the bishop, as data controllers, must notify the Information Commissioner (ICO), of the personal data that they hold in electronic format. Failure to notify (unless specified exemptions apply) is a criminal offence. Notifications are required to be renewed annually and this can be done online and a fee of £35 is charged.

Dioceses are subject to the eight data protection principles and must manage all personal data against these principles:

1. Personal data shall be obtained and processed fairly and lawfully.
2. Personal data shall be obtained only for specified and lawful purposes and shall not be used for any other purpose.
3. Personal data should be adequate, relevant and not be more than is necessary to complete the task for which it was collected for. However, keeping records for historical and research purposes are a legitimate reason for keeping records.
4. Personal data shall be accurate and, where necessary, kept up-to-date.
5. Personal data should not be kept for longer than is necessary for completion of the task it was collected for.
6. Personal data shall be processed in accordance with the rights of data subjects under the Data Protection legislation.
7. Personal data should be kept securely and safely with appropriate technical and organisational measures being taken against unauthorised or illegal processing, accidental loss or destruction of personal data.
8. Personal data shall not be transferred to a country or territory outside the European Economic Area, unless that country ensures an adequate level of protection of the rights of data subjects.

The implication of these principles is that organisations should have procedures in place to cover the review of personal information held on files and databases. This means organisations must assess how long they need to keep information for, the purpose for which they are holding it and when it will be destroyed.

The 1998 Act also provides individuals with important rights, which include the right for individuals to find out what personal information is held on computer and in most paper records.

Should an individual or organisation feel they’re being denied access to personal information to which they are entitled, or feel their information has not been handled according to the eight principles, they can contact

the Information Commissioner's Office for help. Complaints are usually dealt with informally, but if this isn't possible, enforcement action can be taken.

Further information can be found on the Information Commissioners web site: <http://www.ico.gov.uk>

6 COPYRIGHT

Copyright protects the physical expression of ideas, in general, it protects, it protects the maker of a work from appropriation of their labours by another. As soon as an idea is given physical form, e.g. a piece of writing, a photograph, music, a film, a web page, it is protected by copyright. There is no need for registration or to claim copyright in some way, protection is automatic at the point of creation. Both published and unpublished works are protected by copyright for a specified period, typically 70 years from the date of publication or the death of the author.

Copyright is normally owned by the creator(s) of the work, e.g. an author, composer, artist, photographer etc. If the work is created in the course of a person's employment, then the copyright holder is usually the employer.

Copyright is a property right and can be sold or transferred to others. Authors of articles in academic journals, for example, frequently transfer the copyright in those articles to the journal's publisher. It is important not to confuse ownership of a work with ownership of the copyright in it: a person may have acquired an original copyright work, e.g. a painting, letter or photograph, but unless the copyright in it has expressly also been transferred, it will remain with the creator.

Copyright is regulated by law, the principal statute in the UK being the Copyright Designs and Patents Act 1988 (CDPA). (amended on a number of occasions since coming into force on 1 August 1989). In addition the law relating to copyright has been affected by various statutory instruments. including the Copyright and Related Rights Regulations 2003 which incorporated into UK law the changes required by the EU Copyright Directive.

Copyright law grants to copyright holders certain exclusive rights in relation to their works. They have the right to: copy a work, issue copies to the public, perform show or play it, make adaptations or translations. They also have the right to prevent:

- others communicating a work to the public by electronic transmission, e.g. broadcasting it or putting it on a website.
- others making available to the public a recording of a performance by electronic transmission, e.g. putting it on a website.

The law provides certain ways in which copyright works may be used without the need to first obtain permission from the copyright holder(s) - these include, fair dealing, library privilege, copying for examinations and copying for instruction. Copyright licenses permit copyright works to be copied and used in various ways. Otherwise, written permission must first be obtained from a copyright holder before their work is used or copied. Infringing the rights of copyright holders may be a criminal offence and/or cause them to sue for damages.

As a result of certain international treaties and conventions, works produced in many other countries have the same copyright protection in the UK as those created here. For further information, see Intellectual Property Office website: <http://www.ipo.gov.uk>

7 CONTRACTS AND AGREEMENTS WITH RECORD OFFICES

The more historical records of the diocese will be deposited with the Diocesan Record Office (DRO) usually administered by the local authority. In some dioceses there may be more than one DRO. Historically arrangements between individual dioceses and their DRO have been regulated by local agreements of varying degrees of formality ranging from informal understandings through to formal signed agreements.

Such agreements, however informal or formal usually relate to the deposit of parish registers and records under Section 7 of the Parochial Registers and Records Measure 1978 (the “1978 Measure”).

Whatever the nature of an agreement with a DRO it should be reviewed periodically and the agreement should cover the following areas:

- Definition of the parties, area and subject of the agreement including whether the agreement relates solely to parish records deposited under the 1978 Measure or diocesan records or both.
- Ownership of records deposited with and held by the DRO, including copyright status.
- Public access arrangements for records transferred as archives and the confirmation of any necessary closure periods for sensitive material.
- The scope and standards of professional archive services being provided by the DRO including delegating powers of appraisal to the staff of the DRO (e.g. can the DRO decide to destroy material; can it digitise and commercially exploit material; and how is access managed and decided upon).
- Procedures for the temporary and permanent withdrawal of archive material.
- Any financial arrangements that may be agreed.
- Provision of arbitration procedures in the event of dispute (The National Archives is willing to be named as an independent source of conciliation between the parties but cannot offer formal binding arbitration in any such dispute over the terms of an agreement).

A model template for such an agreement is available from application from the Church of England Record Centre.

8 PROJECT MANAGEMENT GUIDELINES FOR IT PROJECTS

Increasingly the main format for records will be electronic and often using specialist software sometimes specifically developed to meet the requirements of the diocesan administration. The following questions provide a brief check list of issues to consider when planning for an IT project (or indeed for any large scale project). This does not aim to be a comprehensive list (it does not for example include anything about tendering, contracts, or penalty clauses) but it does highlight the major factors to consider in managing and delivering projects.

1. What function(s) are you are trying to deliver and/or what problems are you trying to solve?
2. How critical is this? What is the risk or impact of not going ahead? It may be that the risk of not going ahead is more acceptable than the cost of the alternative.
3. What is the level functionality you need to be able to deliver - work towards this not back from a solution! List the functions or “requirements” and rate them from “essential” to “nice to have”. Check that requirements are genuine needs and not just carrying forward workarounds from old systems or practices. Time invested at this stage in consulting widely and getting sign up is immensely valuable.
4. How can you achieve these requirements - assess each option (or for IT projects the package) against your essentials and “nice to have” to decide which most closely matches your needs.
5. Has someone else focused on and achieved the required level of functionality such as another diocesan office? In other words, don’t reinvent the wheel - if someone else already has the solution then consider using it.
6. Compare any option with ‘do nothing’ as a useful benchmark.
7. Now that you know what you want to do and what it is going to achieve, write a clear specification. Make sure that it is unambiguously clear about what is to be achieved, how it will be achieved, who by, and at what cost so that all parties are in agreement at the outset. Be clear about governance - who is responsible and who has what authority to make decisions.
8. Cost the various options including ‘do nothing’. Be aware that all projects are essentially a combination of quality, cost and time to achieve benefits. Any of these - quality, cost, time can be altered but will always impact on the other two (e.g. less time = more cost; less cost = lower quality).
9. Establish the pay back for each option, not forgetting to include the ongoing costs - for example in licences for an IT package.
10. Make the decision - in line with the authority agreed at point 7.

Support the implementation with a project scope with specific, measurable, achievable and realistic and timetabled (SMART) objectives. Agree how those doing the project will report back on progress against these objectives to those who are governing and paying for the project.

Further Resources: the following two books may be useful, though there are many more on the topic of projects and project management:

Managing Successful Projects with Prince 2.

Publisher: Stationery Office Books; 5Rev Ed edition (31 May 2005)

ISBN-10: 0113309465

Project Management for Dummies

Publisher: Wiley; 2nd edition 2007

ISBN-10-0-470-04923-5

There is also useful advice on the following UK Government website including their own checklist of success factors for IT Projects:

<http://www.egov.dpc.wa.gov.au/index.cfm?event=projectsBetterPracticeFramework#Business>

9 DECIDING WHAT THE DIOCESE NEEDS TO KEEP

The retention advice made in this section is given in Section 10.1 – 10.10 in the form of a schedule and follows the same order of record groups.

Although many records 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 permanent value.

The purpose of this document is to give diocesan 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.

Records divide into categories of retention.

The diocese must keep: Those records which the diocese is legally required to maintain either permanently or for a minimum period. Records of historical value for research or business continuity should after they are no longer required for current administrative purposes be transferred to the Diocesan Record Office.

The diocese may keep: Those records which the diocese has no legal obligation to retain after they cease to be required for administrative purposes, but having a continuing historical value for research. The diocese should consult the Diocesan Record Office before disposing these records.

The diocese should dispose of: The records, which, at the end of their administrative life have no longer term statutory or historical value.

Retention Schedules

It is strongly recommended that the diocese develops a retention schedule that includes all the records created whether electronic or paper which clearly states the period of retention for each series or category of records.

Appraisal of Records

For some records there may be potential for selecting records on either random or selective basis where the significant material may be identified without having to retain the whole series (for example a DAC file on a historically significant church building). Appraisal should be undertaken from two perspectives. Firstly an appraisal undertaken by the diocese assesses the business value of the records and secondly an appraisal undertaken by the Diocesan Record Office assesses the historical value of the records. It is important that these two appraisals are undertaken together as joint exercise by the diocese and Diocesan Record Office prior to a deposit being made.

Records of historical value should be transferred to the Diocesan Record Office as soon as possible after the records cease to be required for current administrative needs, subject to local negotiation with the Diocesan Record Office.

9.1 Diocesan Advisory Committee

Diocesan Advisory Committees (DACs) have operated since the 1920s and are now regulated by the provisions of the Care of Churches and Ecclesiastical Jurisdiction Measure 1991 (“ the 1991 Measure”). One of the functions of the DAC listed in Schedule 2, paragraph 1(c) of the 1991 Measure is to ‘develop and maintain a repository of records relating to the conservation, repair and alteration of places of worship, churchyards and burial grounds’. However, the legislation gives no guidance about the management and retention of these records.

The minutes of the DAC and quinquennial reports relating to individual churches should be retained permanently and consideration be given to depositing them with the Diocesan Record Office (DRO). For advice concerning faculties see the paragraph 9.8 relating to the Diocesan Registry.

The Secretary of the DAC must compile and maintain a register of all petitions for a faculty referred to the DAC for advice and ensure that the register is available for inspection by the public by prior appointment (the 1991 Measure, Section 15(3)). These records should be kept permanently

Case Files, whether electronic or paper formats, relating to individual churches should be retained for a minimum of 20 years after the date of the last transaction. At the end of this period consider selectively retaining those files relating to significant cases and destroy the rest. The faculty and the quinquennial reports should be a sufficient record of the changes authorised by a grant of a faculty.

Inventories of all articles and tenements of all lands appertaining to a particular church received from the Churchwardens should be retained for a minimum of 5 years until the next quinquennial report.

9.2 Diocesan Board of Finance

Diocesan Boards of Finance (“the DBF”) were established by the Diocesan Boards of Finance Measure 1925. They are usually companies limited by guarantee and are subject to regulation under the charity, company and financial legislation. General legislation provides for a series of retention periods for a variety of records and these are given in the schedule following paragraph 10d of this guide.

The signed minutes of the DBF and the annual accounts should be kept permanently.

Stewardship records including accounts, analysis of results, promotional literature and training should be kept for 10 years or until the next stewardship campaign as they can assist the planning of subsequent campaigns.

Parish accounts received by the diocese should be kept for 6 years, however the master set of the accounts should be retained by the parish and eventually deposited with the DRO.

9.3 Diocesan Synod

The Diocesan Synod is the successor of the Diocesan Conference. A full set of agendas, signed minutes and reports of the Diocesan Synod and of its boards, committees and including any ad hoc working groups reporting directly to the Synod should be kept permanently. The signed minutes of diocesan working groups not directly supported secretarially and created by the diocesan administration should be treated as diocesan records. An archive set of Standing Orders should be kept permanently.

9.4 Ecumenical

Records relating to ecumenical and inter-faith relations both within the diocese and in the wider Church community can be of considerable historical and theological interest as they document the evolution of relations between the various Christian denominations and other Faiths.

Formal agreements relating to a Local Ecumenical Partnership (LEP) under Canon B44 between the bishop and the appropriate authority of each participating church in respect of any parish should be retained permanently in the diocesan registry.

Policy and project files should be appraised 20 years after the last transaction in the record and those records identified as of historical significance ultimately deposited with the DRO.

9.5 Education

The Diocesan Board of Education (“the DBE”) is responsible for promoting education according to the faith and practice of the Church of England and co-operating with other religious bodies and local authorities and was established by The Diocesan Board of Education Measure 1991. These guidelines apply to any legacy records inherited from the former Diocesan Education Committee.

Education records are much regulated by secular legislation and this guidance only relates to the records created by the Diocesan Board of Education.

The agendas, signed minutes and reports of the DBE should be retained permanently and ultimately be deposited at the DRO. Trust deeds and Instruments of Government should be retained permanently in the diocesan registry. Files relating to individual schools should be retained for the life time of the school and if closed deposited with any admission registers and log books at the DRO.

Policy files should be appraised after 10 years and, if they contained significant information concerning the evolving education practice and management of Church schools, should be deposited at the DRO. Certain records require only to be kept for a limited period of time and these include general claims for voluntary schools (7 years).

9.6 Housing and Property

The management of the property assets of the diocese including parsonage houses, former glebe land and other premises vested in the DBF creates a variety of records. These will be divided between the diocesan department managing property and the diocesan registry and this guidance relates to the property management records created by the diocese.

Property files relating to a specific property such as a parsonage house or piece of glebe should be kept. Particular care should be taken with records that include any information of a sensitive nature, such as security codes and alarm details.

Architectural drawings, photographs and plans should be retained as long as the property remains in the ownership of the diocese. If the property is sold, this material should either be handed away to the new owner or if of historical significance deposited with the Diocesan Record Office.

9.7 Human Resources

Personnel files relating to the clergy kept by bishops and their staff fall outside the scope of this guide. For such guidance see ‘Confidential Files On Ministers Guidance Notes for Bishops and Bishops Secretaries’ and the most recent edition was issued by Lambeth Palace in June 2008 and is published on the Lambeth Palace Library website: http://www.lambethpalacelibrary.org/files/Care_of_Clergy_files.pdf

The guidelines in section 10.8 apply to the lay employees of the diocesan administration and follow the generic advice based on statutory limitations.

However, personnel files relating to lay employees with responsibilities bringing them into contact with children should be retained indefinitely after their employment ceases. However, any copies of actual Criminal Records Bureau (CRB) disclosures should be kept for no longer than 6 months. Further guidance can be found on the NSPCC website: - <http://www.nspcc.org.uk>

These files should be kept in a locked filing cabinets or in pass word protected electronic folders or systems. It is essential to keep accurate records of any concerns, disclosures and allegations relating to children and vulnerable adults. Facts observed or disclosed should be accurately recorded, signed and dated. If records are being kept without the knowledge of the subject, it should be clearly recorded why this is so, for instance

if there is a pattern of behaviour which needs to be monitored or third party information, such as a letter of complaint or police information. Actions taken and decisions made should be noted. Who is party to the information, for example, the subject of the report, the child's parent etc, 'a need to know' monitoring group for a sex offender, should be recorded

The diocese **must keep securely**:

- A file for each lay member of staff and volunteer
- Letters and other correspondence pertaining to disclosures received from the CRB should be kept for as long as those volunteers and employees are in the particular role for which Disclosure was obtained. CRB certificates must never be duplicated and must be destroyed within 6 months of a recruitment decision being made.
- A dated register of those who have been CRB cleared, for administrative purposes (such as ensuring renewals, or to provide a quick reference). However, any copies of actual CRB disclosures should be kept for no longer than 6 months.
- Any communication from third parties, e.g. complainants on any matter, the police or Social Services and a factual record of the actions taken.

Concerning records relating to allegations of misconduct, the guiding principle is that all relevant information should be kept in the appropriate file and that separate or parallel files should not be created or maintained. Working papers should be fully maintained while any issues are being dealt with but on completion may be weeded unless the issue being dealt with is of a serious nature (e.g. financial corruption in which case a complete file should be retained). As a minimum a summary note of any issue must be kept on file indefinitely and this must include the following information:

Issue or allegation and its source

How it was resolved and the outcome

This is necessary to protect all parties involved.

9.8 Legal & Registry

The Registry is the legal office of the Diocese. Its officers are appointed and its work is governed by a large number of statutes and measures notably the Ecclesiastical Judges and Legal Officers Measure 1976. Every diocese has a minimum of two Legal Officers, the Chancellor and the Registrar (who may have deputies). The Legal and Registry activities will include legal advice to the Bishop and all other clergy, diocesan administration and the clergy, clergy appointments, consecrations, faculties, marriage licences, patronage and documents supporting the proceedings of the Consistory Court.

Many of the records and documents listed in Section 10. 8 of the retention schedule should be retained permanently in the custody of the Diocesan Registry or be deposited with the DRO.

Clergy Discipline Measure 2003 Records should be kept locked in a safe and not placed on the personnel file; see paragraph 40, '*Confidential Files on the Clergy Guidance Notes for Bishops and Bishops Secretaries, June 2008*'

Pre-registration title deeds do not need to be retained for legal purposes after registration. However, it may be difficult to identify an error or prove that one has been made without the original deeds as evidence. It is recommended to retain pre-registration title deeds for any property in the current ownership of the diocese and not to destroy any deed without careful consideration of its contents and the land to which it relates.

Conveyancing files relating to purchases and sales of diocesan property should be destroyed 15 years after the completion of the transaction. Keep sealing registers for the Diocesan Board of Finance and other diocesan bodies indefinitely.

Visitation records have historically been regarded as diocesan records and these should be retained for a minimum of 20 years.

With a large series of records such as Visitation records, it may not be possible to retain all the records, even if of historical significance. If this is the case one option is to deposit with the DRO a mutually agreed sample.

9.9 Mission and Communications

Records are created by the diocese's activities to promote the mission of the Church and communicate its message. Such records relate to the development and the changing pattern of the Church's Ministry and evolution of new expressions of spiritual reflection in new forms of worship and the way the Church delivers its ministry and communicates its activities to the wider community. Some of these records may be of considerable historical interest and a major source for the research into history of the Church of England and the changing culture and structures of the society it serves. For example outreach projects to bring the Church to new audiences may include analytical information about the structure and character of local communities that may be of interest to a future local historian. The way these activities are organised will vary considerably between different dioceses.

Policy and project files should be appraised 20 years after the last transaction in the record and those records identified as of historical significance ultimately deposited with the DRO. The Church of England Record Centre can provide a model set of appraisal guidelines on request.

Voluntary Church Organisations associated with the diocese such as the Mothers Union should be encouraged to use these guidelines as one of their sources of advice for managing their records and depositing material of historical significance with the Diocesan Record Office.

9.10 Pastoral Reorganisation and Patronage

The records relating to the pastoral organisation of the diocese and pastoral schemes should be retained. Copies of Pastoral Orders and files relating to schemes of pastoral reorganisation should be retained permanently.

Patronage is regulated by the Patronage (Benefices) Measure 1986 (the "1986 Measure") and the Patronage (Benefices) Rules 1987 (the "1987 Rules"). The 1986 Measure established the Register of Patrons and this register should be retained permanently. The legislation does not give specific periods of retention but it is recommended that patronage documentation set out in the 1987 Rules should be retained for a minimum of 25 years.

10 RETENTION GUIDELINES

This section sets out the retention advice given in Sections 9.1 – 9.10 in the form of a table and follows the same order of record groups.

The following retention guidelines give suggested minimum periods for keeping various type of diocesan record. If you are in any doubt please seek advice from your Diocesan Record Office, which is usually your local Archives and Local History Service. Details of the DRO can be found in the diocesan entry in the Church of England Year Book.

Key:

Deposit at the Diocesan Record Office/Registry:

Important material which needs to be kept permanently. It is acceptable to deposit originals with the Diocesan Record Office or Registry.

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 archivists there to take an appropriate sample.

10.1 Diocesan Advisory Committee

Basic record description	Retention Period	Final Action
Diocesan Advisory Committee Agendas, Signed Minutes and Reports.	Retain permanently.	Deposit at the Diocesan Record Office (DRO)
Register of Petitions	Retain permanently.	Deposit at the DRO
Quinquennial inspections of Churches	Retain permanently.	Deposit at the DRO
Register of all petitions for a faculty	Retain permanently.	Deposit at the DRO
Case Files, whether electronic or paper formats relating to individual churches.	Retain for a minimum of 20 years after the last transaction.	Consider selective retention.
Inventories and terriers received from Churchwardens	Retain for 5 years or until the next quinquennial report.	Destroy

10.2 Diocesan Board of Finance

Basic record description	Retention Period	Final Action
Certificate of incorporation	Retain permanently.	Retain in the diocesan registry
Signed Memorandum of Association	Retain permanently.	Retain in the diocesan registry
Signed Articles of Association	Retain permanently.	Retain in the diocesan registry

Basic record description	Retention Period	Final Action
Annual Return to Companies House	Retain for 3 years.	Destroy
Board agendas, signed minutes and reports.	Retain permanently.	Retain in the diocesan registry
Sealing Register	Retain permanently.	Retain in the diocesan registry
Accounting Records to comply with the Companies Act 1985, section 221.	Retain permanently.	Retain in the diocesan registry
Signed report and accounts.	Retain permanently.	Retain in the diocesan registry
Budgets and periodic financial reports	Retain for 6 years	Destroy
PAYE records (post April 2004)	Retain for 6 years.	Destroy
Cheques, bills of exchange and other negotiable instruments	Retain for 6 years.	Destroy
Bank statements and reconciliations	Retain for 6 years.	Destroy
Stewardship records including accounts, analysis of results, promotional literature and training.	Retain for 10 years	Destroy
Parish Accounts. Please note parishes should permanently retain a master set of their accounts.	Retain for 6 years.	Destroy

10.3 Diocesan Synod

Basic record description	Retention Period	Final Action
Agendas, Signed minutes and Reports of the synod its boards, committees and ad hoc working groups.	Retain permanently.	Deposit at the DRO

Basic record description	Retention Period	Final Action
Standing Orders.	Retain permanently.	Deposit at the DRO

10.4 Ecumenical

Basic record description	Retention Period	Final Action
Policy and Project files	Appraise after 20 years.	Deposit historical material at the DRO.
Local Ecumenical Partnership Agreements (LEP) under Canon B44	Retain permanently.	Deposit at the DRO.
Policy and Project Files	Appraise after 20 years and retain those records of historical significance.	Destroy or deposit at the DRO

10.5 Education

Basic record description	Retention Period	Final Action
Diocesan Board of Education agendas, signed minutes and reports.	Retain permanently.	Deposit at the DRO
Denominational Education Inspections under Section 48 of the Education Act 2005.	Keep until the next inspection.	Destroy
Headships unsuccessful applications	6 months after the appointment of the successful candidate.	Destroy
Headship successful applications	6 months after the appointment of the successful candidate.	Place on the appropriate school file.
Instruments of Government	Retain permanently.	Deposit at the DRO

Basic record description	Retention Period	Final Action
Policy and Project Files	Appraise after 10 years and retain those records of historical significance.	Destroy or deposit at the DRO.
School Files	Retain permanently.	Deposit at the DRO
School Log books	Retain permanently.	Deposit at the DRO
Admission Registers	Retain permanently.	Deposit at the at the DRO
Trust Deeds	Retain permanently.	Deposit at the DRO or retain in the diocesan deeds registry.

10.6 Housing and Property

Basic record description	Retention Period	Final Action
Asset Registers/Terriers	Retain permanently.	Permanent
Deeds of title (including pre-registration title deeds)	Retain until sold or transferred.	Retain and if of historical value deposit at the DRO.
Leases (signed copies)	Retain for 12 years after the expiry of the lease/Licence (as the case may be).	Destroy
Subletting agreements (signed copies)	Retain for 12 years after the expiry of the lease.	Destroy
Wayleave Agreements	Retain for 12 years after the expiry of the agreement.	Destroy

Basic record description	Retention Period	Final Action
Landlord's consents	Retain for 12 years after the expiry of the consent.	Destroy
Licences	Retain for 12 years after the expiry of the licence.	Destroy
Planning consents	Retain until property is sold or transferred.	Hand away to new owner or deposit at the DRO.
Listed building consents	Retain until property is sold or transferred.	Hand away to new owner or deposit at the DRO.
Building Specifications	Retain until property is sold or transferred.	Hand away to new owner or deposit at the DRO.
Architectural drawings, photographs and plans.	Retain until property is sold or transferred.	Hand away to new owner or deposit at the DRO.
Bills of Quantity	Retain for 25 years.	Destroy
Tender Documents	Retain for 15 years after the completion of contract.	Destroy
Agreements with contractors and consultants	Retain for 15 years after the completion of contract.	Destroy
Case or property records relating to an individual site in a paper form or as database entry.	Retain for 15 years after sale/transfer.	Destroy

10.7 Human Resources

Basic record description	Retention Period	Final Action
Job applications and interview records	6 months after the appointment.	Destroy
Personnel records including, annual performance assessments, disciplinary matters, job descriptions, training and termination documentation.	6 years after employment ceases.	Destroy
Personnel records relating to employees with contact with children including, annual performance assessments, disciplinary matters, job descriptions, training and termination documentation.	Indefinitely after employment ceases.	Destroy
Contracts of employment and changes to terms and conditions.	6 years after employment ceases.	Destroy
Annual Leave Records	2 years after the leave is taken.	Destroy
Expenses Claims	6 years after the claim.	Destroy
PAYE and National Insurance Records	6 years plus the current year.	Destroy
Health and Safety Policy Statement	6 years and revise.	Revision
Minutes and reports of Health and Safety meetings	Retain permanently.	Retain in the diocesan offices.
Health and Safety Risk Assessments	Keep until replacement.	Destroy
Criminal Records Bureau Certificates	Within 6 months of the recruitment decision being made	Destroy

10.8 Legal and Registry

Basic record description	Retention Period	Final Action
Bishops Act Books	Retain permanently.	Deposit at the DRO
Patronage Register	Retain permanently.	Deposit at the DRO
Petitions Register – Faculties	Retain permanently.	Deposit at the DRO
Consecration Register	Retain permanently.	Deposit at the DRO
Institution Register	Retain permanently.	Deposit at the DRO
Sealing Registers	Retain permanently.	Retain in the Diocesan Registry
Orders In Council and Church Commissioners Orders	Retain permanently.	Deposit at the DRO
Suspension of Patronage Orders	Retain permanently.	Deposit at the DRO
Legal Opinions and Rulings	Retain permanently.	Retain in the Diocesan Registry
Ordination Certificates	Retain permanently.	Deposit at the DRO
Marriage Licence Affidavit Forms	Retain permanently.	Deposit at the DRO
Clergy Discipline Measure 2003 records – including copies of the Archbishops’ List of clergy should be kept locked in a safe or be encrypted.	Retain permanently.	Deposit at the DRO

Basic record description	Retention Period	Final Action
Visitation Returns.	Retain for a minimum of 20 years.	Consider depositing at the DRO
Parish files	Retain permanently.	Deposit at the DRO
Benefice and Diocesan Deeds	Retain permanently.	Deposit at the DRO
For Patronage records, see Section 10.10		

10.9 Mission and Communications

Basic record description	Retention Period	Final Action
Policy and Project Files	Appraise after 20 years.	Deposit historical material at the at the DRO
Press Releases	Retain permanently.	Retain in the diocesan offices
Diocesan Newspapers	Retain permanently.	Deposit at the at the DRO
Web Site – take a snapshot of at least once a year, and particularly before major changes to the site.	Retain permanently.	Deposit at the at the DRO

10.10 Pastoral and Patronage

Basic record description	Retention Period	Final Action
Pastoral Committee agendas, Signed Minutes and Reports	Retain permanently.	Deposit at the at the DRO
Pastoral Schemes	Retain permanently.	Deposit at the at the DRO

Basic record description	Retention Period	Final Action
Patronage Register	Retain permanently.	Retain in the diocesan registry.
Benefice or Parish Information	Appraise after 20 years.	Deposit historical material at the at the DRO
Voluntary Diocesan Organisations for example the Mother Union.	Appraise after 20 years.	Deposit historical material at the at the DRO

11. 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.

Appraisal – The selection of records for permanent preservation in accordance with an agreed set of criteria to assess their value in accordance with a series of primary values, such as their administrative, legal, or financial usefulness, or secondary values, such as their historical, informational, evidential, and research values.

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.

Diocesan Record Office (DRO) – A Record Office which is an agreed place of deposit for diocesan records and usually parish records as well. This will usually be the local authority archive service.

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 or Archdeacon, 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 generally does not apply to the Church of England, except marriage registers dated after 1837, which technically belong to the Registrar General of Births, Deaths and Marriages.

Functions –The activities of the record creator and for which the records were 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.

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.

LEP - Local Ecumenical Partnership (LEP) a formal agreement under Canon B44 between the bishop and the appropriate authority of the participating Christian denomination to operate a joint ministry in a parish or part of a parish.

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 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 – Formal record of a transaction or right for example the Register of Patrons created by the Patronage (Benefices) Measure 1986.

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.

Statute – An Act of Parliament.

Statutory Instrument - Delegated legislation where power to make orders, rules, regulations and other subordinate legislation is conferred on the Her Majesty in Council or on a minister of the Crown by Order in Council.

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.

12. Contact details

Church of England Record Centre	15 Galleywall Road, South Bermondsey, London SE16 3PB Tel: +44 (0)2078981030 Fax: +44 (0)2078981043 email: archivist@c-of-e.org.uk website: http://www.cofe.anglican.org/about/librariesandarchives/
Church of England, link to individual diocesan websites	http://www.cofe.anglican.org/links/dios.html
Catholic Archives Society	Honorary Secretary, Margaret Harcourt Williams, Innyngs House, Hatfield Park, Hatfield, Hertfordshire AL9 5PL The Society has published a series of Archive Advice Leaflets including retention concerning financial records and a glossary of basic archival terms: http://www.catholic-history.org.uk/catharch/advicepams.htm
Diocesan Secretaries Liaison Group	Mrs Lucinda Herklots, Secretary, Church House, Crane Street, Salisbury SP1 2QB Tel: 01722 411922
Information Commissioner	Information Commissioner's Head Office, Wycliffe House, Water Lane, Wilmslow, Cheshire, SK9 5AF. Tel: 01625 545 745 Fax: 01625 524 510 DX 20819 email: mail@ico.gsi.gov.uk website: http://www.ico.gov.uk

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Records Management Guides from the Church of England

The Libraries and Archives of the National Church Institutions have produced a number of Records Management guides. All are freely available to download from the Church of England Website:

www.cofe.anglican.org/about/librariesandarchives

Others in the series are:

Keep or Bin: The Care of Your Parish Records

Confidential Files on Clergy - Guidance Notes for Bishops and Bishops' Secretaries