

**This document was produced by staff at Kent Archive and Local History Services contact:
Elizabeth Barber 01622 696581**

Contact details:

Centre for Kentish Studies: 01622-694363 archives@kent.gov.uk

Canterbury Cathedral Archives:

General Enquiries: 01622-865330 archives@canterbury-cathedral.org

Conservation: 01622-865263

East Kent Archives Centre: 01304-829306 eastkentarchives@kent.gov.uk

**Medway Archives and Local
Studies Centre: 01634-332714**

**Bexley Archives and Local
Studies Centre: 020-8836-7369 archives@bexley.gov.uk**

**Bromley Archives and Local
Studies Centre: 020-8461-7170**

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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, The National Archives and the Society of Archivists.

If any incumbent or parish official needs advice or guidance on the care of record material, ancient or modern, they should contact the relevant Diocesan Record Office (see front page/contact sheet).

2. WHY BOTHER TO MANAGE YOUR RECORDS?

There are a number of reasons why parishes need to manage their records properly. Although ensuring that the records are kept properly and disposed of appropriately is not usually the top of anyone's list of jobs to do it is very important that the parish records are well managed. 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 is buried, and 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

The purpose of this leaflet is to give parish officers the confidence to distinguish between the records which ought to be kept and those which may safely be thrown away when they are no longer required for administrative purposes.

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 as they are likely to be of permanent historical value.

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

3a Church Services

The parish **must keep**:

- registers of baptisms, marriages and burials - Permanent (deposit)
- registers of banns, confirmations and services - Permanent (deposit)

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.

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, archdeacons' certificates under the pre-1991 legislation, and accompanying papers, photographs, plans and drawings - Permanent (deposit)
- plans, correspondence, accounts and photographs relating to major repairs or alterations - 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 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 handbook. Advice about this can be obtained from Archives and Local History Service.

Pasting or sticking typed copies in bound volumes is not recommended because of the generally unsound archival quality of glues and adhesives. 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)

The parish **may keep**:

- letters and reports relating to major developments in the parish if they contain important information
- an archive copy of important circulars or questionnaire forms
- 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

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.

- 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)⁴
- other supporting documents, including cash books, bank statements, wages records, vouchers and routine correspondence (current financial year + 6 years)
- planned giving and gift aid records (current financial year + 6 years)

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 it is felt necessary to retain the records this can only be done with the permission of everyone mentioned in the records (if they are still living). If these records should be deposited in the Diocesan Record Office a closure period of at least 85 years must be applied to the records.

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

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 is 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.

⁴ The Central Board of Finance has produced a parish account book entitled *Parochial Church Accounts*, in a loose-leaf format which provides for the inclusion of audited accounts.

The parish **may keep**:

- public notices
- rota duty lists
- offertory accounts
- preliminary drafts of minutes or accounts
- routine correspondence
- vouchers recommended for eventual destruction

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 the relevant Diocesan Record Office will be able to advise. It may be appropriate to transfer the whole series to the DRO 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*⁵
- 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 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. Using the guidelines above (3a-3g) and the retention schedule 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.

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

⁵ 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. The relevant DRO will be pleased to advise about this.

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.

If possible the registers and other vital documents should be stored in a safe. However, the records should not be stored in the same safe as the candles, wafers, wine, ink, oil grease or articles made of cloth. If the safe is damp, it is advisable to put some silica gel in the safe to help maintain suitable humidity levels.

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.

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 quality⁶. Make sure that books placed upright on shelves are firmly supported, if necessary by rigid shelf dividers.

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 Archives and Local History Service.

4b Protection and repair of your documents

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 stiff material 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 immediate 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.

⁶ The Diocesan Record Office can advise about these.

If a document is damp and smells of mould, place it in a natural current of dry air. Seek advice as soon as possible, as the mould may still be active.

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 MANAGING ELECTRONIC RECORDS

Whilst computers have made parish administration much easier there are a number of issues which need to be addressed concerning the management of electronic 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.

All computers should have appropriate virus checking software 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.

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.

Information concerning managing parish records against current data protection legislation is available from the Diocesan Secretary, Diocesan House, Lady Wootton's Green, Canterbury.

7 RETENTION GUIDELINES

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 the relevant Diocesan Record Office for advice.

Key:

Permanent (deposit)	Important material which needs to be kept permanently. It is acceptable to deposit originals with the Archives and Local History Service 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 Diocesan Record Office	Permanent (deposit)
Banns registers	Arrange phased transfer to the Diocesan Record Office	Permanent (deposit)
Service Registers	Arrange phased transfer to the Diocesan Record Office	Permanent (deposit)
Orders of Service	Arrange phased transfer to the Diocesan Record Office	Permanent (deposit)
Baptism certificate counterfoils; marriage certificate counterfoils; copy burial certificates; applications	Last entry + 2 years	Destroy

Basic record description	Keep in parish	Final Action
for baptisms or banns		
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, Archdeacons' certificates 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)
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
Organ specifications, contracts, papers	Last action + 5 years	Permanent (deposit)
<i>Parsonage House</i>		
Plans, photographs, drawings	Last action + 5 years	Permanent (deposit)
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the parsonage house	Last action + 5 years	Permanent (deposit)
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy
Quinquennial reports	Last action + 5 years	Permanent (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)

Basic record description	Keep in parish	Final Action
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

Basic record description	Keep in parish	Final Action
		(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
Parish Finance		
Annual audited accounts	Current year + 6 years	Permanent (deposit)
Ledgers	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
Parish organisations - M.U., Youth Clubs, choir, bell-ringers etc		
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

Basic record description	Keep in parish	Final Action
		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)