

8 RETENTION GUIDELINES

This section sets out the retention advice given in Sections 7.1 – 7.9 in the form of a table and follows the same order of record groups.

The following retention guidelines give suggested minimum periods for keeping each type of parish record less than 100 years old. If you are in any doubt please seek advice from your Diocesan Record Office, which is usually your local Archives and Local History Service.

Key:

Deposit at the 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 Diocesan 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 Local Record Office to allow the archivists there to take an appropriate sample.

8.1 Church Services

Basic record description	Keep in parish	Final Action
Baptism, marriage, burial, and confirmation registers	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Banns registers	Arrange phased transfer to the Archives and Local History Service	Permanent (deposit)
Service Registers	Arrange phased transfer to the Archives and Local	Permanent (deposit)

⁷ 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.

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

8.2 Church Buildings and Property [see also Legal Documents]

Basic record description	Keep in parish	Final Action
<i>Church, furnishing and contents</i>		
Faculties, citations and accompanying records	Last action + 5 years	Permanent (deposit)
Terrier and inventory, logbook	Last action + 1 year	Permanent (deposit)
Architects' Quinquennial reports	Last action + 5 years	Permanent (deposit)
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	Review for possible deposit
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the parsonage house	Last action + 5 years	Review for possible deposit
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy
Quinquennial reports	Last action + 5 years	Review for possible deposit
<i>Churchyard</i>		
Plans, registers of graves, faculties, citations and accompanying records	Last action + 5 years	Permanent (deposit)
Agreements concerning maintenance of churchyard, graves and memorials	Last action + 5 years	Permanent (deposit)
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the churchyard	Last action + 5 years	Permanent (deposit)

Basic record description	Keep in parish	Final Action
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy
<i>Church Hall</i>		
Plans, architects' reports	Last action + 5 years	Permanent (deposit)
Music, dancing and P.R.S. licences	Last action + 5 years	Review/Sample
Agreements for use of hall	Current year + 6 years	Review/Sample
Minutes, accounts, specifications, tenders, contracts, plans, photographs, drawings and other papers relating to major works to the church hall	Last action + 5 years	Permanent (deposit)
Contracts, tenders and specifications for minor works	Last action + 6 years	Destroy

8.3 General 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)

Basic record description	Keep in parish	Final Action
Copies of replies to Articles of Enquiry	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

8.4 Parish Finance

Basic record description	Keep in parish	Final Action
Annual audited accounts	Current year + 6 years	Permanent (deposit)
Cash books, bills, vouchers, bank statements, other subsidiary financial records	Current year + 6 years	Destroy
Planned giving schemes	Current year + 6 years	Destroy unless anonymised
Gift Aid Declarations	Keep as long as they are valid + 6 years	Destroy
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

8.5 Pastoral Care, Safeguarding and Health and Safety

Basic record description	Keep in parish	Final Action
Accident reporting sheets or book – if relating to adults	Date of incident + 20 years	Destroy
Accident reporting sheets or book – if relating to children	The date when a child became an adult + 20 years	Destroy
A clear Criminal Records Bureau (CRB) certificate or disclosure letter of confirmation.	Within 6 months of the recruitment decision	Destroy
Risk assessment recommendations and management plan in the event of an unclear or blemished CRB disclosure.	50 years after appointment/employment ceases	Destroy
Records of other safeguarding adult or child protection incidents either within the parish or within a family/ by an individual where the Parish was the reporting body or involved in care or monitoring plans. That is, any sex	50 years after the conclusion of the matter.	Destroy

Basic record description	Keep in parish	Final Action
offender risk assessments and monitoring agreements.		
Records of any children's activities, Sunday school/ junior church/youth club registers and related general safety risk assessments. Any communication from parents or other parties in relation to the above.	50 years after the activity ceases.	Destroy
Personnel records relating to lay employees not working with children and vulnerable adults: including annual performance assessments, disciplinary matters, job descriptions, training and termination documentation.	6 years after employment ceases	Destroy
Personnel records with contact with children and vulnerable adults including all documentation concerning any allegations and investigation regardless of the findings.	50 years after the conclusion of the matter.	Destroy
Parish agreement with the diocese on Obtaining CRB Disclosures.	Last action + 5 years	Permanent (deposit)

8.6 Legal Documents

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

8.7 Other Parish Records

Basic record description	Keep in parish	Final Action
Public Notices	Current year + 5 years	Consider sampling
Rota Duty Lists	Current year + 2 year	Destroy
Routine Correspondence	Current year + 6 years	Destroy

8.8 Parish Organisations

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

8.9 Publications

Basic record description	Keep in parish	Final Action
Bibles ,Communion Books, Hymn Books, Prayer Books, Psalters and Service Books.	Replace with new versions	Consider keeping one sample copy on replacement
Altar and desk editions of the Bible, Common Book of Prayer and Common Worship.	Replace with new versions	Permanently retain in the parish.
Church Guides and Parish Histories	Replace with new versions	Permanent (deposit)
Parish magazines	Last action + 5 years	Permanent (deposit)
Scrapbooks, newspaper cuttings, brochures, record of gifts, photographs	Last action + 5 years	Permanent (deposit)