

Record Retention Schedule

Retention periods which based on legal/regulatory requirements are marked “[requirement]”.

Records to be sent to the public record office

The following are records that should be preserved on a permanent basis. When they are no longer required by the church for operational purposes they should be deposited in the local public record office.

Type of record	Notes
Meeting minutes, agendas and supporting papers for church meeting, elders’ meeting, church groups	
Publications and resources	Includes church histories and magazines, memoirs of minsters or church members
Records documenting church events	Reports, programmes, photos. Not including records documenting the organisation of the event e.g. RSVPs
Baptism, marriage and burial registers	Store in a secure location, ideally a safe
Lists of members, and/or adherents	These should be dated
Orders of service	
Photographs	Dated with people and events identified
Final annual accounts (preferably signed)	
Architectural drawings, photographs, and plans for church and hall	

Type of record	Notes
List of tombs in graveyards and inside the church	Copy inscriptions where possible

Other records

Type of record	How long to keep it	What to do with it
General correspondence, enquiries etc.	Last action on correspondence + 2 years	Destroy
Databases, mailing and contact lists	Keep most up-to-date version	Destroy when no longer required
Finance records including: cash books, bills, bank statements, budgets, accounting records and other subsidiary financial records	Current financial year + 6 years [requirement]	Destroy
Receiving and administering legacies, covenant payments and trusts	Life of legacy/ covenant/ trust + 6 years	Destroy
Records documenting the acquisition of ownership of properties	Disposal of property + 12 years [requirement]	Destroy
Records documenting the disposal of properties by sale, transfer or donation	Disposal of property + 12 years [requirement]	Destroy
Records documenting leasing-out arrangements for properties	Expiry of lease + 12 years [requirement]	Destroy
Deeds of title for properties	Disposal of property	Transfer to new owner
Records documenting applications for planning consents and consents granted	Disposal of property OR Expiry of consent (whichever is sooner)	Transfer to new owner OR Destroy

Type of record	How long to keep it	What to do with it
Records documenting major maintenance and development works on property	Completion of work + 15 years OR Disposal of property [requirement]	Destroy OR Transfer to new owner
Records documenting the negotiation, establishment, review and alteration of contracts and agreements between the church and others	End of contract + 6 years [requirement]	Destroy
Records documenting the arrangement and renewal of insurance policies	Keep permanently	Keep permanently
A note on the whereabouts of the Trust Deed(s), and any related documents, of the congregation*	Keep permanently	Keep permanently
The Trust Deed(s), and any related documents, of the congregation	Keep permanently	Keep permanently
Records relating to concerns about those working with children and young people	Date of concern + 75 years	Destroy
DBS certificate information**	Six months maximum[requirement]	Destroy
Allegation of a child protection nature against a member of staff/ volunteer, including where the allegation is unfounded	Date of allegation + 75 years	Destroy
Records of children's activities and events e.g. registers, risk assessments; consent forms; insurance, health & safety records, incidents and application records; medical information; volunteers; accommodation lists	Date of activity/ event + 25 years [requirement]	Destroy
Personnel records including: contracts,	Termination of employment + 10	Destroy

Type of record	How long to keep it	What to do with it
appraisal records, job descriptions, training records, sickness records, termination of employment documentation	years [requirement]	
Accident report	Adult: date of incident + 3 years Child: until child reaches 21	Destroy
An index to any church library	Keep permanently	Keep permanently***
A record of furnishings, lighting fixtures etc (with dates); artefacts given to church (include dates and origins); church silver, plate, china, mugs etc (with photographs in case of theft); memorial tablets (with a note of the text); war memorials (including note of text); stained glass.	Keep permanently	Keep permanently

*If the Synod Trust is the trustee of the church building, ascertain whether these documents are held at the synod offices or with their solicitors. Congregations whose property is not held under the Synod Trust should inform the synod of the names of the trustees of the church buildings.

**The actual disclosure form must be destroyed after 6 months. However a record can be kept of the date of issue of a certificate, the name of the subject, the type of certificate requested, the position for which the certificate was requested, the unique reference number of the certificates and the details of the recruitment decision taken. A record of whether a disclosure was clear/ unclear or blemished must not be kept.

***This should not be transferred to the archive in the event of the church closing.