

The Methodist **Archivists'** Handbook

A guide
for those
undertaking
the role of
archivist at
church, circuit
or district level



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Foreword

To keep or not to keep, that is the question. It is one that faces every family who moves house or reviews what they have; every business that looks at the files that have built up at the end of a year; every student who completes a course and shuffles the notes that were taken in lectures and every church that fills a minute book or register.

In the last case, the question to keep or not to keep is (as it is delightfully put on p15 of this Handbook) whether to send to the hell of the shredder or incinerator or the heaven of an archive. Because in the church, in circuits, in districts, and connexionally, we are blessed by the ministry of archivists who use their wisdom and expertise to guide us as to what should or should not, perhaps now what must and what must not, be retained. It is essential that as a Church we preserve a record of the decisions that we make and that we comply with the legal requirements relating to the information we create and hold. Without your efforts, this would be a daunting task and one that will not become easier as regulations multiply and record keeping becomes more complex. It is therefore timely to set out guidance on approaches and practices to support all our volunteers so that we continue to maintain the high standards of record keeping that we have always sought to achieve.

However, the archivist's ministry is not simply to ensure that the Church complies with the statutory responsibilities that we have; it is also to remind us that our paperwork is a record of our life. Historians in the future will be grateful for the information that we leave them. The archives of our local churches, circuits and districts are a unique and irreplaceable treasure and can become invaluable source material. They record the stories of those who have walked before us; they are a source of inspiration for our mission and our faith; they will inform the knowledge, the belief, the understanding and the worship of communities, families, and individuals yet to be born.

It is, therefore, a great privilege to provide the Foreword to this Handbook for Methodist Archivists and to thank The National Archives for the generous grant which has enabled us to develop this Handbook. I would also like to record my thanks to Dr Sarah Horton who has authored the Handbook and to the members of the Archives and Records Advisory Group who have overseen and guided this work.

I want also to express my gratitude to you who read this Handbook for taking on the role of archivist and giving so generously of your time. Safeguarding and caring for our archives is a significant responsibility in the Church. The many hours that are spent sorting, appraising, and preparing records for transfer to local archive services so that they can be preserved and made accessible to anyone with an interest in Methodist history are a precious and often unseen gift to the church and to wider society.

This Handbook is designed to support you as you undertake this important role and will be a useful 'go to' reference for you. This is an exciting development and a comprehensive new resource for the administration of Methodist archives. I hope and pray you will find this Handbook a useful and valuable addition to your toolkit.

A handwritten signature in black ink, appearing to read 'Jonathan'.

The Revd Dr Jonathan R Hustler

Secretary of the Methodist Conference

1. Introduction

Ministry of Memory

As one of the largest Christian churches serving Britain, the Methodist Church recognises the value of ensuring its records are appropriately managed and preserved, so that its story can be understood by future generations. Good record-keeping is a valuable tool for contemporary mission, but also roots us in our past, enabling us to remember and honour the Methodist mission of our predecessors.

The Church's legal framework *Constitutional Practice and Discipline (CPD)* provides formal authority to preserve records under Standing Order 015 and associated provisions. These set out the principle that all records deemed worthy of permanent preservation "shall be deposited on permanent loan with a public authority having appropriate repository facilities". This will usually be the local authority archive service (sometimes known as a 'record office') for your geographical area.¹

Before deposit, records are organised with support from a network of volunteer archivists, who are recruited to work at church, circuit and district level, with oversight from the Methodist Heritage Committee, and an appointed Liaison Officer for Methodist Archives. Records at central connexional level are managed separately and are not covered by this Handbook.

This Handbook

The Methodist Archivists' Handbook has been developed to provide you, as volunteer archivists, with guidance to deal with the records in your care with confidence. It will be a key source of reference for you, but, as you will see, it is just one element of the advice and support available. Our goal is to support you to secure the archival legacy of your church, circuit or district – the records that tell *your* story – and to preserve them for the future.

¹ These are the designated repositories for the Methodist Church. Please do not offer records to other organisations such as libraries or museums, even if they already hold Methodist collections. If you cannot identify the archive service for your area, please contact the Liaison Officer for Methodist Archives (see section 6).

The Handbook is accompanied by a short series of training presentations – *Induction Training for Methodist Archivists* – which are available to download from the Methodist Church website (see Appendix 1, link 1).

Take your time to look at each of these presentations in turn. Each one covers key points from sections of the Handbook. Please don't try to read everything at once. Start at the beginning and think about what is relevant to you and where you feel you need help and guidance. Remember that some material may not always reflect your particular situation and experience.

The following sections of the Handbook will provide you with useful information on where you fit in the Methodist structure; what we mean by records and archives; and on the responsibilities of your role. Section 5 Essentials of Being a Methodist Archivist will guide you through the key tasks involved. The Handbook concludes with contact information for advice and support. Remember you are never alone.

As you work your way through these sections you will find colour-coded tables with specific information for different levels within the Methodist Church structure (blue for the local church; yellow for circuits; purple for districts). You will also find references to the Appendices which contain a range of useful reference documents and other factual information.

2. Methodist Structure

The local churches, circuits and districts of the Methodist Church in Britain together form the Connexion. This is far more than a structure. It is an expression of belonging that expresses and witnesses to “a mutuality and interdependence which derive from the participation of all Christians through Christ in the very life of God” (*Called to Love and Praise*, Methodist Conference, 1999, paragraph 4.6.1). Connexionalism is therefore a way of being Christian, in that all Christians are linked to one another, and no church, circuit or district is, or can be an autonomous unit (see *The Gift of Connexionalism in the 21st Century*, Methodist Conference, 2017).

Connexionalism in action can best be seen in the Methodist Conference, which meets in a different location each summer. Members are elected from each Methodist district, with wider representation from connexional and other bodies, including the Irish Methodist Conference and other international representatives. The Conference is a place of Christian conferring and is the supreme decision-making body of the Methodist Church in Britain.

As a volunteer archivist, the focus of your work will be at local church, circuit or district level. While they are all part of the Connexion, there are differences in scope and administration. The following table summarises how churches, circuits and districts work, with a note of the key meetings that take place at each level.

Table 1: local churches, circuits and districts

Church

Each **local Methodist church** is governed by its own church council, which has authority and oversight of the whole ministry of the church, including membership, management of property, the appointment of officers and committees and pastoral oversight. There must be a minimum of two church councils each year. These normally occur in September/October and February/March, however additional meetings may be held at other times (often in June/July).

Membership of the church council includes ex-officio members (such as ministers and officers) and members elected by the general church meeting, which meets annually and is open to everyone in the local church. Where church membership does not exceed 49, and the church council so resolves, all members of the local church who are willing to serve may be members.

Key members of the church council include the church stewards, the church treasurer and the church property steward.

Circuit

Every Methodist church is part of a **circuit**. Each circuit consists of a group of local churches served by local preachers and ordained ministers (presbyters and deacons) and is overseen by a superintendent minister. It is worth noting that ministers are appointed to circuits, not to local churches.

The circuit meeting is the focal point for the circuit: the superintendent chairs the meeting and is responsible for setting the agenda which can be wide-ranging. There must be a minimum of two circuit meetings each year, in September and March, but additional meetings may be held at any time. The circuit meeting is attended by circuit staff, circuit stewards and other office-holders, together with representatives of each local church in the circuit (including church stewards and treasurers). The meeting appoints the circuit steward and circuit property steward, and also the circuit archivist (although it is not compulsory to have an archivist).

Archives should feature on the circuit meeting agenda at least annually, to remind people of the need to preserve records and comply with their responsibilities under Standing Order 015(2).

District

Every circuit is located in a **district**, which is a group of circuits led by a district chair. A district synod meets in representative session at least once each year for worship, information-sharing and decision-making. A presbyteral session of the synod is also usually held for presbyters, which is an opportunity for training as well as for debating issues. District archivists are appointed by the district synod under Standing Order 473.

Central teams of district trustees also meet on a regular basis to oversee the work of the district. This meeting may variously take the form of a district executive, district council, district policy committee or district leadership team. Typically they meet at least three times a year and sometimes more frequently.

Further information about the current structure of the Methodist Church can be found at [link 2](#) in Appendix 1.

3. New to Archives?

Welcome to the role of Methodist archivist! Our volunteer archivists fulfil a vital function for the Methodist Church: together with our people and properties, our records are one of the most important resources enabling mission.

We keep records to help us make future decisions, to prove that we have done the right thing, and that we are acting according to the law. But our records also allow current researchers and future generations to understand what Methodism was about, what Methodists did, and why they did it. So you may find that part of your role is to help direct people interested in Methodism in your area to where they can find out more.

We have set out in the following pages the key aspects of the archivist role and where to look for further guidance and information, but before we go any further it is important to be clear on what we mean by records and archives.

Records and Archives

These words can have different meanings in different contexts. Here we will focus on what archivists (the people you will be working with in local archive services) mean when they use these terms.

Records

Since the invention of writing, people, organisations and societies have been creating records – documenting what they do, what they have, and who they are. If you think about your own day-to-day life, you can probably identify examples of records you create and keep for various purposes, or that are created and kept about you.

Until recently most records were probably created and kept on paper or in other physical formats such as photographs. However, today's records are increasingly created and kept on computers: as emails, word-processed files, spreadsheets or digital images.

Whatever their format, records serve as evidence should we ever need to prove that something happened – that we own something, that we did something, that we are who we say we are, or that we are acting within the law. Some of our records may also be more personal to us – letters, diaries or journals, photographs and so on. These are our records of memory, helping us recall those things that are important and personal to us and to our families.

The Methodist Church and the people who form its community, whether ordained or lay officials, also create records. Some of those records will be about the day-to-day business and administration of the Church, some will be about its ministry and mission, and some will document its activities as a larger connected community – the Connexion.

Going back to the idea of 'records' and what we create and keep personally – we may not consider some to be very important. You may keep a receipt for a small cash purchase only for as long as you need it to prove where the purchase was made. You may keep a receipt for a larger purchase, made using a card, for a little longer – until the item is out of its guarantee period, or until you are sure that the banking transaction has been correctly processed.

It is the same for the records that are created by and for the Church – some will be quite mundane and only have to be kept for as long as they are needed for current business, or to provide evidence that may be required under external regulation (such as safeguarding, finance, human resource management, or health and safety). Some may need to be kept for much longer periods.

In section 5.3 of the Essentials of Being a Methodist Archivist we will return to this issue, to explore how it works in practice.

Some records have what archivists often refer to as long-term value – these are the records that become your archives.

Archives

On a personal level, we all keep documents that are evidence of ownership; we would never, for example, dispose of records that show we own our house or car.

In a similar way, the Church keeps records of its governance and management – records of Conference and Synod, church council minutes, and records of district and circuit meetings. The Church also keeps finance, property and legal documents. Taken together, these are the archives that show how the Church is managed, how decisions are reached, how Church policy has developed, and how its resources (funds and property) are administered.

Sometimes records are kept for historical or research purposes – helping to tell the story of the organisation for future generations.

For the Church this may include publications such as church guides, magazines or newsletters, together with records of events, anniversaries or commemorations. These may be in the form of scrapbooks, newspaper cuttings, photographs and videos. As archives, these are the items that show the Church as a living social community – telling the story of the people called Methodists.

One particular class of records – baptism, marriage and burial registers – are of wider interest for family history research. They may still be in the custody of the local church and are important evidence for individuals, as well as a research resource for local community history. If not in current use, all such registers should be deposited with your local archive service.

The role of Methodist archivists is primarily to ensure that Methodist Church records held by individual churches, circuits and districts are adequately and suitably administered. This means that you will be responsible as a record-keeper for both current records and those with long-term value which are to be deposited as archives with your designated archive service.

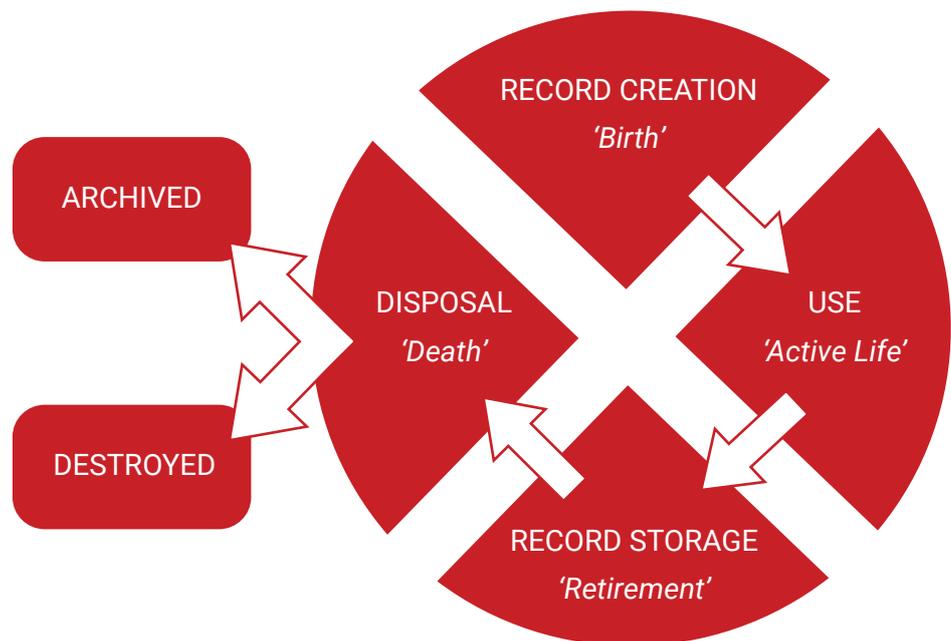
You will need to liaise closely with colleagues in your area who are involved in creating and using the records on a day-to-day basis. They also have a role to play, and we will touch on this in the next section on 'Responsibilities'.

In what follows, it might help you to think of record-keeping and the records themselves as having a 'life cycle' much like our own.

The life cycle of records

This is a concept used by professional archivists and record managers as a framework for managing records. It thinks of records as passing through the following life stages:

- Birth – when they are created to meet some record-keeping need.
- Active life – when they are being used, supporting the work of the organisation.
- Retirement – when they are no longer in regular use, but need to be kept for administrative, legal or other reasons.
- Death – when they are no longer required by the organisation. At this point they may:
 - be destroyed (the ‘hell’ of the shredder or incinerator) if they have no further value
 - be permanently retained (in the ‘heaven’ of the archive) if they have historical value.



You will have a role at all these stages working alongside colleagues within your church, circuit and district. We will discuss these responsibilities in more detail in the next section, and the Essentials of Being a Methodist Archivist (section 5) will guide you through the tasks involved.

4. Responsibilities

Our volunteer archivists have responsibilities appropriate to the level at which they are working (local church, circuit, district). All our archivists, however, work to ensure that the records of the Methodist Church are well managed. They also raise awareness of the importance of our archives and the role they play in preserving the story and heritage of the Methodist Church.

The table below summarises the responsibilities for records at local church, circuit and district level. As with all voluntary positions in the Methodist Church, recruitment into your volunteer archivist role will be in accordance with wider 'Safer Recruitment' principles (see Appendix 1, link 3).

**Table 2:
Role of
archivists**

Church

Local church archivists You may be the latest person to be charged with looking after the records created as part of the business of your church. This could include keeping the minutes of church council and other meetings, dealing with correspondence, maintaining registers and membership lists, and liaising with other local church officers such as the church stewards and treasurer and property stewards, who also create records.

While the records are in active use, your responsibilities will involve advising on good practice for creating, organising and storing the records. This may include direct custody of the records, particularly when they are no longer in regular use. As they reach the end of their active lives, you will then work with your circuit archivist and/or district archivist to ensure that the records are dealt with appropriately (either through secure destruction, or transfer to the designated local archive service).

Your superintendent minister has ultimate responsibility for local church and circuit records and should be consulted if the roles of circuit/district archivists are vacant.

Circuit archivists are appointed at the discretion of the circuit meeting. It is not a compulsory appointment recognised by Standing Orders, but it is encouraged.

As a circuit archivist, you will have wider responsibilities for the administrative records of the circuit, as well as for ensuring that individual church records are being properly looked after. You will support and advise circuit and church staff on record-keeping issues. You will also promote good practice and work to ensure that records are retained in accordance with the Church's retention schedules, with records of archival value identified and deposited in designated local archive services.

You will liaise with your circuit administrator and other circuit officers; with locally based church officers/archivists within your circuit; with your district archivist; with the Liaison Officer for Methodist Archives; and with the local archive service(s) which hold church and circuit archives for your area. Your superintendent minister may also have a role here.

See Appendix 2: Circuit Archivist Role Profile

District archivists are appointed by the district synod in accordance with Standing Order 473 – this should give you a seat on synod, but districts will vary in their practice on this.

If you are an appointed district archivist, you will have a more wide-ranging role than a circuit archivist, with responsibilities for the administrative records of the district, and for co-ordinating with volunteer archivists working at circuit and local level. You will support and advise districts, circuits and churches on record-keeping issues, promote good practice, and ensure that records are retained in accordance with the Church's retention schedules, with records of archival value identified and deposited in the relevant local archive service.

You will work collaboratively with your district administrator and other district officers; with locally based church officers and archivists; with your circuit archivists; with the Connexional team (notably the Heritage & Collections Officer) and the Liaison Officer for Methodist Archives; and with the local archive service(s) which hold church, circuit and district archives for your area.

Your district chair has overall responsibility for district records and should also therefore be consulted. Where there is no circuit archivist, the superintendent minister is responsible.

See Appendix 3: District Archivist Role Profile

Please note that responsibility for Connexional records lies with the relevant secretary or convener and is outside the scope of this Handbook. However, it may be useful for you to be aware of who is responsible for archive collections centrally.

The Connexional Archive is held by the John Rylands Research Institute and Library in Manchester in their Methodist Archives and Research Centre (MARC), and the Missionary Society Archive at the School of Oriental and African Studies (SOAS), University of London. To find out more, see Appendix 1, link 4.

Advice and support

Whatever level you are working at, there is always help and support available to you, including, of course, in this Handbook!

- If you are working within an individual local church, your first port of call should be your circuit or district archivist. If you don't already have their contact details, check your circuit directory or district handbook/directory, or get in touch with your district administrator, who should be able to direct you to the right person.
- Similarly, if you are working at circuit level, your main contact is likely to be your district archivist.
- All volunteer archivists can also call on the Liaison Officer for Methodist Archives – an appointee of the Methodist Heritage Committee – for advice and support on both modern records and archives. See section 6 for contact details.
- At Connexional level there is a Heritage & Collections Officer within the Connexional Team who will be your contact if you find yourself being asked about heritage objects within a church. While objects (eg artworks, furniture or church silver) are not part of the documentary 'archive', they can have real historical value, and you should ensure that questions about their future are directed to the right person – see Appendix 4 for further guidance, and section 6 for contact details.

Finally, you will have access to professional advice from archivists who work for the local archive service where you will deposit the records that become your archives

Local archive service

There will be a designated archive service with which the deposit of local Methodist archives for your area has already been agreed. This will usually be the local authority archive service (sometimes known as a 'record office') for your local area.

You can use online catalogues such as The National Archives *Discovery* catalogue (see Appendix 1, link 5) to search for information on where Methodist records for your area may already be held. You can search by name of place, or branch of Methodism to find what you need. If you are still uncertain which archive service you need to work with, contact the Liaison Officer for Methodist Archives for advice.

Archivists from your local archive service will work with you to make sure that the records you transfer are the right ones, and that they are prepared and organised so that they can be preserved and made available to people who need them in the future.

5. Essentials of Being a Methodist Archivist

This is where you really get started. Don't worry if it all seems a bit daunting to begin with, the following sections will guide you through the key tasks and there will always be someone you can contact for advice and support.

Each section builds on what comes before. Start at the beginning, and don't feel you need to read it all at once. It can help to take the work in stages, and each section is designed to enable you to do this. Remember, unless specific reference is made to format, when we talk about 'records', these could be physical (paper) and/or digital formats.

Section 5.1: *Getting Started* sets out some useful first steps, which will make sure you have the resources, contacts and information you need.

Section 5.2: *Getting Sorted* turns to the records themselves. What have you got? What records do you need to collect? How do you organise them?

Section 5.3: *What to Keep* considers what to keep and for how long. It explains the purpose of the retention schedules, and how data protection rules might apply to your records. It will also take you through processes for appraising (determining value) and disposing of those records that don't have archival value.

Section 5.4: *From Records to Archives* looks at how records can be prepared for deposit with your local archive service. It covers how you weed the records (identifying material that can be disposed of), the transfer process, and how you can add value by providing descriptions of the records to help people understand the story they tell.

Section 5.5: *Current Records* explains what you need to do to ensure the records (paper or digital) that are in your custody, or which are being created now, are able to be preserved in the longer term. What are their preservation needs? How do you handle them, store them and keep them secure?

At the end of each of these sections you will find a handy checklist summarising the key actions involved.

5.1. Getting Started

This section sets out some useful first steps, which will make sure you have the resources, contacts and information you need.

Space and equipment

First things first – you need somewhere to work with the records. This should be a secure space on Methodist Church premises – a room which can be locked to keep the records safe, or with storage cupboards or cabinets where the records can be secured when you are not working on them.

This is important because some of the records may contain financial information or the personal details of individuals, which should not be openly accessible to everyone who may use the space.

The space itself should be large enough for a table where you can lay things out if you need to, with room for you take notes or set up a laptop if you prefer to use one.

If the space is going to be used for storing current records in the longer term, make sure it is also dry, clean and pest-free (further advice about how best to store your current records is provided in section 5.5).

Speak to your administrator and/or property steward about what space could be made available for your work. They will be able to help you and ensure that any necessary paperwork, such as the *Key Holder Declaration form* is completed.

Top tip

Alert other people who use the premises to what you are doing. Explain the records you are dealing with are potentially very important to the Church. To them, your records may look like a pile of old papers that need throwing away and you don't want to come back from holiday to find that someone has helpfully cleared them all out for you!

There are also a few basic resources (stationery and equipment) that it will help to have on hand. Much of what is in this 'kit' is referred to in later sections. See Appendix 5 for a list of what you need and where it can be purchased and speak to your administrator about funding. A small budget should be available to you.

Make contacts

You need to develop contacts with other church officers and members of your community who may be able to help you with information or resources. You need to explain who you are, what your role is and what you may need from them. The written role profiles will be helpful here (see Appendices 2 and 3) and you will also find some example briefing papers which you can use as the basis for communicating what you do to senior colleagues in Appendix 6.

If available, publications such as the church directory, circuit list or directory, and district directory or handbook, will contain useful contact information for colleagues working at all levels.

You should also ensure that the Heritage & Collections Officer in the Connexional Team has your contact details. They will make sure you are signed up to the Archivists' Network for which there is a regular newsletter, and an online support group which you can join if you wish

The Liaison Officer for Methodist Archives can also be contacted for specific advice via the online group (see also contact details in section 6).

The table below sets out for you who your potential contacts are and how they can help you. Remember that at each level, you are part of a wider community of volunteer archivists who are facing similar situations and challenges. Their questions and solutions may well be your questions and solutions!

Use the resources of your Archivists' Network to make these contacts, and if you have the opportunity to attend circuit meetings or district synod, use this to 'network' and make contacts more widely. These are the people who are also walking your path – no one will understand what you are dealing with better than them!

Table 3: Useful contacts

Church

If you are a **local church archivist**, you will be talking to the people who form your immediate community, and with whom you probably already work quite closely – for example your church stewards. Let them know what you are doing, speak to them about how they might be able to support you and what resources (notably space to work) you need. If possible, arrange to address the church council annually to raise awareness of the importance of church records and of their potential archival value.

You should also be in close contact with whoever has wider responsibility for record-keeping within your circuit. This will either be the designated circuit archivist or, if this post is vacant, the superintendent minister, circuit administrators, or the district archivist for your region. The circuit archivist will usually be your first port of call for advice and support.

Circuit

If you are a **circuit archivist** you will need to develop contacts across the circuit and at district level. Your contact will include:

- locally based church officers responsible for the records of individual churches within your circuit
- colleagues within the circuit (the circuit steward, property stewards, circuit administrators, and the superintendent minister)
- your designated district archivist (if there is one)
- the local archive service(s) with which church and circuit records for your area are deposited.

A good working relationship with other circuit officials will ensure that you have access to the resources you need and are kept informed of important developments at circuit level that may have an impact on the records. For example, property stewards will have up-to-date information on any plans to close local churches and circuit administrators and superintendents will be involved in planning for mergers or other structural changes at circuit level.

If possible, arrange to address the circuit meeting periodically to raise awareness of the importance of the records and of their potential archival value. If you are able to, attend your district synod so you can network with other volunteer archivists from your area.

If you are a **district archivist** you will have wider responsibilities, and will need to develop contacts with:

- locally based church officers responsible for the records of individual churches within your district
- colleagues from circuits in your district (circuit archivists, circuit stewards, property stewards, circuit administrators, and superintendent ministers)
- colleagues within the district (the district administrator, the district chair)
- the local archive service(s) with which church, circuit and district records for your area will be deposited.

Good working relationships with district and circuit officials are important to help you keep up to date with structural change within the district and its constituent circuits, churches and institutions. Particular care is needed when local churches or institutions close. You will need to ensure that the records are brought into safe keeping. Working with your circuit archivists, you will need to take action as soon as the intent to close is confirmed and active worship ceases. You may also need to alert the Heritage & Collections Officer of any historic objects that may be at risk.

You should arrange to address the district synod annually to remind people of the need for both good management of the records while in current use, and of the need to preserve those records with archival value, in accordance with Standing Order 015.

Get some background

Before you start looking at the records themselves it is always useful to do some background research to establish what types of records you are likely to be dealing with.

This may all be very new to you. You can start by talking to whoever looked after the record-keeping for your church, circuit or district before you. If that isn't possible, talk to colleagues involved with organising church business (meetings, committees, accounts, etc) to find out what they do, and the types of records they create.

If you have been working in your role for a while and are already familiar with the records that church business at your level generates, the table below summarise the broad types of record you have probably encountered. This is not an exhaustive list, and there may be things you can add.

More detailed information on the types of records relevant at each level of the Methodist structure can be found in the official *Retention Schedules for Methodist Churches, Circuits, Districts and Connexionally Owned Properties* (see Appendix 1, link 6). We will explore the role of retention schedules and what they tell us in more detail in section 5.3.

Table 4: Types of records

Church

Local church records may include the following, although not all may be relevant particularly for smaller churches:

- Church meeting records – including the minutes and papers of church council and the general church meeting; those of other committees reporting to the church council; and meetings of associated youth organisations.
- Employment records (where relevant) – this may include contracts of employment; tax, insurance and pension contribution records; expenses claims; and records of appointments and resignations.
- Finance records – including annual accounts and those of reporting organisations; cash books; statements; etc.
- Membership records – such as church membership lists; mailing lists; pastoral lists and records; Sunday school rolls and registers; and baptism and marriage registers.
- Property records – including title deeds; property agreements and leases; property logs and inspection reports; insurance policies; and burial registers/records of graveyards.
- Health and safety records – notably accident reports and any records documenting external inspections.
- Safeguarding records – including safeguarding meeting minutes; records of any children’s activities; relevant personnel records; risk assessments; etc.
- Publications – this may include church magazines or newsletters; church guides; anniversary publications; and miscellaneous items such as scrapbooks, photographs and newspaper cuttings.
- Legal documents – such as partnership agreements; trustee declarations; data protection records; and copyright licences.
- Miscellaneous/general records – including general correspondence; records of anniversaries and events; photographs and videos of events; visitors’ books; ministers’ papers; and certificates for public worship and registration for marriages.

Circuit records are likely to include the following:

- Circuit records are likely to include the following:
- Circuit meeting records – including the minutes of circuit meetings; those of other committees reporting to circuit meetings; and records relating to ecumenical partners.
- Employment records – this may include contracts of employment; tax, insurance and pension contribution records; expenses claims; and training records.
- Finance records – such as annual accounts and those of reporting organisations; cash books; statements; etc.
- Membership records – including the circuit directory; mailing and contact lists; and the circuit register of baptisms.
- Property records – including title deeds; property agreements and leases; property logs and inspection reports; insurance policies; records of building schemes, church closures and sale of premises; chapel registration certificates; and burial registers/records of graveyards.
- Health and safety records – notably accident reports and any records documenting external inspections.
- Safeguarding records – including safeguarding meeting minutes; records of any children’s activities; relevant personnel records; risk assessments; etc.
- Publications – this may include circuit magazines, newsletters or notices; circuit plans; project reports; and miscellaneous items such as photographs and newspaper cuttings.
- Legal documents – such as partnership agreements; and data protection records.
- Minister, probationer and candidate records, including supervisory files.
- Miscellaneous/general records – including general correspondence; records of anniversaries and commemorations; photographs and videos of events; questionnaire responses, etc.

District records will probably include the following:

- District meeting records – notably the minutes of district committees and synod.
- Employment records – this may include contracts of employment; tax, insurance and pension contribution records; expenses claims; and training records.
- Finance records – such as annual accounts and those of reporting organisations; cash books; statements; etc.
- Membership records – the synod directory, and associated mailing and contact lists.
- Property records – including title deeds; property agreements and leases; property logs and inspection reports; insurance policies; records of church closures and sale of premises; and burial registers/records of graveyards.
- Health and safety records – primarily accident-reporting sheets or books.
- Safeguarding records – including safeguarding meeting minutes; records of any children’s activities; relevant personnel records; risk assessments; etc.
- Publications – this may include district magazines, newsletters or notices; district plans; project reports; and miscellaneous items such as photographs and newspaper cuttings.
- Legal documents – such as partnership agreements; and data protection records.
- Minister, probationer and candidate records, including supervisory files.
- Miscellaneous/general records – including general correspondence; records, photographs and videos of events; questionnaire responses, etc.

It can be useful to put together some background information – an overview of the history and development of the church area(s) you are working in. At an individual church level this may be a simple outline of what happened when – including key dates such as when it was established; when any changes were made in terms of buildings and property; and any important events in the life of the church.

Alongside a church ‘calendar’, think about the activities and groups the church has provided for its local community – Sunday school, family activities, youth groups, and so on. This doesn’t need to be an in-depth history, although it would be worth checking if anything like this has been written for your church, as it will be a valuable source of reference. Rather it is a guide to what types of record should or could exist, and what dates these might cover.

Similarly at circuit and district level, try to trace the key milestones in the history and development of your area. Of particular interest here will be any structural changes over time – the number of churches in the circuit, the number of circuits in the district, and what changed when.

Circuit plans will be a good source of reference here. You will also want to confirm with circuit and district administrators the current structure for your area, and whether there are any planned changes, including mergers.

Top tip

There will often be people who are interested in the historical development of the church who may be able to help you with information. There may also be publications, guides to churches, or entries for your area on online sites such as *My Primitive Methodists*, *My Wesleyan Methodists* and *My United Methodists*.

Don’t worry if you can’t find much in the way of background information. It is useful to help you understand the records and put them in context, but the records themselves will also contain information that will help you organise them.

Getting Started checklist

- Speak to colleagues – your administrator and/or property steward – about a secure space where you can work with the records.
- Assemble your starter kit (see Appendix 5) and ask your administrator about funding.
- Make contact with other church officers and community members who can help you. Check any available publications, such as the church directory, circuit list/directory, or district directory /handbook for contact details.
- Contact the Heritage & Collections Officer in the Connexional Team. Make sure they have your contact details, so you are signed up to the Archivists' Network.
- Use the Archivists' Network and church meetings (the circuit meeting/district synod) to network and to make contact with other volunteer archivists from your area.
- Do some background research to find out what colleagues in your area do and what types of records they create.
- Find out about the history and development of the Church in your area and put together an outline of what happened and when. Remember to check to see if there is an existing published history that covers your church, circuit or district and look at online sites such as *My Primitive Methodists*, *My Wesleyan Methodists* and *My United Methodists*.

5.2. Getting Sorted

Now you have an idea of what you are looking for in terms of the records, it is time to review what is already in your hands and see what might still be 'out there'.

Bear in mind the way the records have been organised and kept will probably have changed over time and could vary within different churches, circuits and districts. You may have records going back decades, and you will simply be the latest person in a long line of record keepers, who did their best, but in their own way!

At the outset this may feel a bit overwhelming, especially if you are faced with lots of boxes and bags of disorganised records. This is not an unusual position to be in: the key is to work through everything logically. As the old joke goes: How do you eat an elephant? One bite at a time!

This section will guide you through processes for creating an inventory of what you already have, for collecting the records that might be elsewhere, and for organising the records into a clear filing structure.

What have you got?

You need to carry out a basic check of the material you already have. Look quickly at each container of records, and work out, if you can, what came from where. If you are dealing with the records of single local church, this should be easy, but if you are working at circuit or district level with records from multiple locations, it may take a little longer.

Make sure you clearly label containers of material with information about their source (sometimes known as provenance) so you know what you've looked at, and already identified. This will give you a 'set' of records for each originating church or office.

Now you can pick one set and get started!

■ **Work through each set of records and make a list**

If you can see that the records have been kept in a clearly structured filing system, then do not disturb this. If there is an existing filing system, it is also worth checking to see if there is some kind of summary of the records as a guide to how they have been organised.

At this point you will probably need to create a basic list for yourself or add information to what already exists. This list will provide you with an overview of what you have and is important to enable you to organise and manage the records effectively.

As a minimum it should cover the following areas:

- Category of record (the following categories are taken from the Methodist Church retention schedules referenced earlier)
 - Meeting records
 - Employment records
 - Finance records
 - Membership records
 - Property records
 - Health and safety records
 - Safeguarding records
 - Publications
 - Legal documents
 - Minister, probationer and candidate records
 - Miscellaneous/general records.
- Type of record – for example, church council minutes or annual accounts (the different types of record within each category are also listed in the retention schedules).
- Covering dates – don't worry about individually dated items but focus on the start and end date for each type of record, and any obvious gaps.
- Location – where it is currently stored (cupboard, box, bag, laptop, memory stick, etc). If there is more than one copy (eg one paper, one digital, or digital copies in different locations) you can also note this.
- Extent – the number of folders or files for paper records; the size of digital files.
- Format – paper; parchment; photograph; digital file format.

Create a list for each container the records are currently stored in, so you know what is where. For example, 'contents of . . . box 1, bag 1' adding a label to each container for reference.

This might give you the following form of basic description or shortlist for each set of records (a blank template version of this list can be found in Appendix 7).

Record category	Record type	Covering dates	Location	Extent	Format
<i>Meeting records</i>	<i>Church council minutes</i>	<i>1990–2000</i>	<i>Box 1</i>	<i>1 folder</i>	<i>Paper</i>
		<i>2000–2020</i>	<i>Box 2</i>	<i>2 folders</i>	<i>Paper</i>
		<i>2021–Present</i>	<i>Laptop</i>	<i>20Mb</i>	<i>MS Word</i>

If during this exercise you come across any really early material (pre-1800) or any missionary records, please take advice from the Heritage & Collections Officer, or the Liaison Officer for Methodist Archives. Such material may be of wider significance and might need to be deposited with one of the central Methodist archives we talked about earlier. You should also consult about sound or visual recordings which may need to be deposited with specialist sound/film archives.

Take care

If you are dealing with material that has not been well looked after, it may be disordered, dirty or in poor condition. Make sure you have plenty of space to sort through the records. If the records are dirty, make sure the space is well ventilated, and wear appropriate clothing. You may want to undertake some light cleaning at this point. If the records are otherwise in good condition, use a clean, soft paintbrush to lightly remove any surface dirt or debris. **Do not attempt to clean or repair fragile or damaged records – this is a job for professional conservators.**

If any of the records are damp or mouldy, handle them as little as possible, and protect yourself while doing so, as mould can be hazardous to health. If you can easily see what type of records these are, make a note, as this will help with decisions about any necessary treatment. (If the records are duplicates, with no long-term value they could simply be disposed of.)

Equip yourself with some basic protective equipment. Disposable aprons, nitrile gloves, face masks (make sure they are rated FFP3) and protective goggles are all readily available online or through local home improvement stores (see Appendix 5).

How badly are they affected? If the mould looks superficial with only small amounts of dry, powdery residue, then they can be cleaned – work outdoors or in a well-ventilated area near a window; wear your protective equipment; use a soft brush to lightly remove deposits, directing these to a vacuum cleaner nozzle (ideally use a HEPA filtered cleaner).

Do not attempt to clean heavily contaminated records. If you have any concerns or are sensitive to mould or dust, then put the records to one side, and consult with your circuit /district archivist or the Liaison Officer for Methodist Archives.

If the mould is extensive and particularly if it is active (if it feels damp, smears, or appears 'hairy'), put the records to one side and isolate them in a sealed plastic container. Seek advice from your local archive service.

Collecting records

The next question is whether each set of records covers all the areas you might expect from the background research you have done. If, after checking through the records, you find that there are significant gaps in particular areas, or for particular time periods, you will need to investigate further.

- Have they already been transferred to circuit or district offices? Or even been deposited with the local archive service? Check with colleagues – your circuit or district archivist or, where posts are vacant, with administrators for the area.
- Find out which archive service your records should be deposited with and check with them what deposits of records they have already received. Most archive services will have an online catalogue on their website. You can search it for information on the Methodist records they already hold – search by name of place, or branch of Methodism to see what you can find.
- Are the records still with a former church officer, or do they know where they might have been stored? Are they with a local minister at the manse?
- Look through cupboards, safes, the vestry, church lofts, cellars, garages and other possible storage spaces. Do take care and don't put yourself at physical risk if these spaces aren't accessible and safe to access.

Encourage church members to be vigilant in identifying records for their area. The families of former members who were active in the church might also be able to help, as there may be documents among their relative's papers or on their computer. It is not uncommon for significant records to be lost on the death of retired church officers and members, as their value may not be obvious to the families. While this is a delicate pastoral matter, the question of whether an enquiry with family is possible, at an appropriate time, is something to discuss with ministers.

It is important to remember that all Methodist records and other papers are the property of the Methodist Church and do not belong to individuals. It is easy for people to come to regard the records of their church as personal property, particularly when individuals or families have been closely involved with the church over long periods of time.

Tact may be required in these circumstances to encourage people to part with items that they value either personally or as local church property. They have to be persuaded of the need for records of archival value to pass from their care to you, and then to safekeeping with a local authority archive service. There are clear issues of risk where records are retained inappropriately by local people, which we shall discuss further in later sections.

It is also important to remember that the personal papers of church members are not Methodist records, even if they cover aspects of the life of the church. This does not mean that these records are not potentially important or should not be preserved – such material can have real value in bringing to life the personal stories of Methodism – but they will not form part of the official church record for which you are responsible.

If asked, you can advise individuals or families with extensive collections of personal papers, which might have historic value, to contact the local authority archive service for the area, to discuss whether they are suitable for deposit. Such papers can also be scanned and digitised and used to contribute to displays or community websites such as *My Primitive Methodists*, *My Wesleyan Methodists* and *My United Methodists*.

Organising the records

Having done all you can to locate any missing records, the next step is to organise what you have as the basis for managing the current records for which you are responsible. It will also help you identify material that should be disposed of or deposited with your local archive service.

- **Original order?**

A key principle for professional archivists is to preserve the original order of the records. This means that as far as possible they would seek to maintain the filing structure established by the creator of the records. This order can itself provide information about how an organisation or individual worked, which is information that can be important for historical or research purposes.

For the Methodist Church however, any original filing system at individual church or circuit level is more likely to reflect the variations in record-keeping between the individuals responsible. For our purposes therefore at church and circuit level, it is more important to ensure that the records deposited as archives have a logical and consistent structure, so that future researchers can easily interpret the records across different churches and circuits.

If you are working at district level however, the principle of original order will be relevant. Districts have a central organising role for their constituent circuits and oversee areas such as employment, property and grant funding.

Their role in the Methodist structure is wider, and the records they create and maintain will reflect how each district operates as part of the overall Connexion. The way in which individual districts work is therefore of potential historical interest and there is value in preserving information about how they keep and maintain their records.

■ Provenance?

Another key principle when organising your records is that of provenance – this is essentially where the record comes from. You may be dealing with records from a number of different provenances, including individual churches and circuit or district administrative offices.

This principle is important because it allows the records to be seen in the context of the record-creating body. Provenance provides a consistent approach to organising the records, which otherwise could be arranged in a myriad of different ways making it more difficult to see how the creating body operated as a whole.

Arrangement by provenance 	Arrangement by type 
Church A <ul style="list-style-type: none"> ■ Meeting records <li style="padding-left: 20px;">Church Council <li style="padding-left: 20px;">... ■ Finance records <li style="padding-left: 20px;">Annual Accounts <li style="padding-left: 20px;">... ■ etc. 	Church Council records <ul style="list-style-type: none"> ■ Church A ■ Church B ■ Church C Annual Accounts <ul style="list-style-type: none"> ■ Church A ■ Church B ■ Church C Etc . . .
Church B	
It is clear how the church works as a whole.	Each type of record is seen in isolation.

This principle is important because it allows the records to be seen in the context of the record-creating body. Provenance provides a consistent approach to organising the records, which otherwise could be arranged in a myriad of different ways making it more difficult to see how the creating body operated as a whole.

■ Arrangement

Archival 'arrangement' is the term used by professional archivists for how records are organised. As we have seen this will always reflect the provenance of the records and often their original order too. You will also see that provenance can work at more than one level, in the organisation of the categories and types of record that each church, circuit or district creates.

This can be mapped into a form of hierarchy which summarises the relationships between the records – starting at the level of the record creator, followed by a categorisation of the records (often by function), and then by constituent types of record (often also based on provenance). The following table takes you through how this might work at local church, circuit and district level. It includes a diagram showing a slightly abbreviated example of how the concept of a hierarchy of records might work for the records of an individual church.

Don't worry too much about the words in *italics* that form part of this – they are effectively 'labels' for each level and are included here as you may come across terms such as fonds and sub-fonds when working with professional archivists.

Table 5: Arranging records

Church

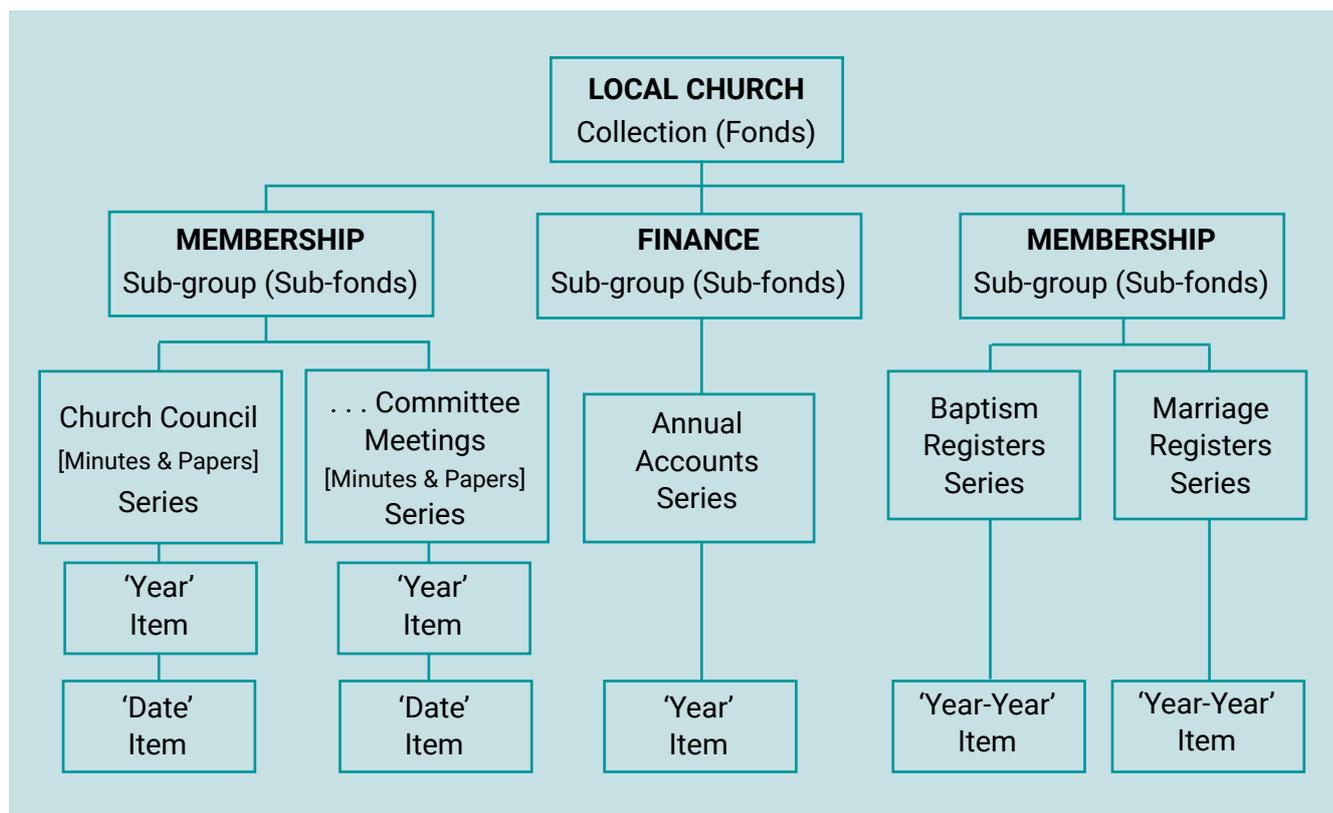
Starting with the **local church** as the record creator at collection level.

Using the lists you created earlier, group the records into the categories from the retention schedules (see section 5.2). These are your subgroups.

Each of these categories contain a range of different types of record as detailed in the retention schedules: these are your series.

Within each series of records, you will then have items such as the minutes from a particular meeting, the annual accounts for a given year, or the baptism register covering a number of years. In some cases, for example minutes, those items can be grouped into overarching files covering each full operational year.

The diagram below shows how this works when mapped to a hierarchy.



Circuit

This same approach can be applied to records at **circuit level**. Again, refer to the retention schedules to identify the types of record (series) that fall into each category (sub-group).

At **district level** you will be applying the principle of original order. Examine the lists you have created to see if there is already a clear filing structure, where you can identify categories (sub-groups) of records, and types of record (series) within these.

It is likely that these will broadly reflect the retention schedules, but there may be some differences in how records are categorised and organised.

If there is no clear existing filing structure, then use the approach detailed above.

This exercise in arrangement can initially be done using the summary lists you have created. Start by plotting for yourself how you think it all fits together for your records. You could draw out a hierarchy (extending the simple example above), or make use of post-it notes labelled with the types of records you have found (which you can arrange into different groups), to get an overview of how your filing structure should work. If you are working at local church or circuit level this should be straightforward, as you will be following the categories and types of record listed in the retention schedules (see also *Table 4: Types of Records* page 27–29).

Sorting the records

Now you are clear on the form your filing structure takes, you are ready to return to the records themselves to review how they have been filed/stored and ensure that this physical organisation matches the intellectual arrangement you have established.

Hopefully you have inherited a well-ordered set of records, but if you have had to gather them from more than one place/source, this may be a more complex task.

As a first step use your summary lists to locate the records for each of your sub-groups:

- Meeting records
- Employment records
- Finance records
- Membership records
- Property records
- Health and safety records
- Safeguarding records
- Publications
- Legal documents
- Minister, probationer and candidate records
- Miscellaneous/general records

Where these are in paper formats, bring them together into physical groupings and then do the same for their constituent series.

- So for *meeting records* at local level you may have separate series comprising the minutes and papers of the general church meeting; church council; each committee that reports to church council; and meetings of any associated youth organisations.

Dealing with digital records

You will need to undertake a similar process for digital files, by creating a hierarchy of folders reflecting your filing structure and moving files into that structure.

This might give you separate folders for each of your categories (sub-groups) of records – with series level sub-folders nested inside these for each relevant type of record, and further file level sub-folders below this which contain your items and individual documents.

Category <i>Sub-group</i>	Type of record <i>Series</i>	Year <i>File</i>	Date <i>Item</i>	<i>Document</i>
Meeting Records 	Church Council 	2022–23 	Date 	Agenda Minutes Report etc 

It is also worth implementing a clear naming convention for your digital documents – giving them useful names that will help you identify what each file contains. Digital files can be almost impossible to find if their names are not specific enough: most people who use a computer have spent a frustrating hour or two trying to work out where they filed something and what they called it!

Use a naming convention that clearly identifies the originating body, the category and type of record, the nature of the document, and its date, as follows:

Organisation name – Record – Type of Record – Document – Date of Record
Category

Anytown Chapel – Meeting Records – Church Council – Agenda – Date

If you are working at district level, with a set of records that are already in a clearly organised structure, all you need to do is retain this and ensure that all the records are filed appropriately.

You are now at the point at which you can appraise the records to determine what you need to keep, and what material should be deposited with your local archive service. You will also need to consider the physical condition of your paper records and take any necessary steps to ensure that they can be preserved for as long as they are needed.

The following sections will guide you through these processes.

Getting Sorted checklist

- If you are dealing with records from more than one location, quickly review what you have in order to identify different sets of records (based on where they came from/their originating body, eg the individual church, circuit office, etc). Clearly label each set so you know which records belong together.
- Check if each set of records has been kept in a clearly structured filing system. Is there an existing summary of the records, or guide to how they are organised?
- If there is no pre-existing list of the records, create a basic list recording: category of record; type of record; covering dates; location; extent; and format. Do this for each set of records and the containers in which they are currently stored.
- If there is already a list, check it against the records and add any information that is missing.
- Look after yourself. The records could be dirty or even mouldy. Work in a well-ventilated area and wear appropriate clothing.
- If you find signs of mould or damp, take care – check the records carefully, and wear protective equipment. Take advice if you are at all concerned.
- If there are gaps in the records, try to locate what is missing. Ask around, check with your archive service, look for where they might be stored.
- Map out a logical filing structure for the records that reflects the categories and types of records in the retention schedules, or (if you are working at district level) the original order of any pre-existing structured filing system.
- Organise each set of physical records according to the filing structure you have established – grouping them by category (sub-group) and type (series) – then into chronological files.
- Organise any digital records into a hierarchy of folders that mirrors your filing structure for the physical records.
- Make sure any digital documents have useful names that make it clear what each file contains – adopt and follow a clear naming convention.

5.3. What to Keep

Now you have your filing structure and have applied this to the records in your care, it is time to consider the question of what to keep and for how long. This section will look at the role of the retention schedule in helping you manage the records; explain how data protection needs to be considered; and take you through processes for appraising (determining value) and disposing of records that are no longer needed.

Remember, we want to ensure that the story of the Church can be told, but we can't keep everything!

The retention schedule

Records are a key organisational resource, but they also require resources for their storage and management. It is important, therefore, only to keep records for as long as they are needed. Good record management saves space, ensures that the organisation is compliant with financial, legal and other regulatory obligations, and saves time, making it easier to find records when they are needed.

As we have already discussed, not all the records created by and for the Church will have long-term value as archives. Some only need to be kept for as long as they are required for current business, or to provide evidence of compliance with external regulations (such as safeguarding, finance, human resource management, or health and safety). Others may need to be retained in the church or circuit safe, or in circuit or district offices for longer periods, because of their ongoing value as evidence.

The retention schedules capture the detailed decisions that have been made for you about how long the different types of record need to be kept, and what happens to them when they reach the end of their active lives.

Remember our concept of the life cycle of records (see page 15). The retention schedules are your reference point for determining what to do with records no longer needed for church business, at the end of this life cycle.

Have a look at the *Retention schedules for Methodist Churches, Circuits, Districts and Connexionally Owned Properties* – see Appendix 1, link 6.

You will see that there are separate sections for 'individual church records' (section 1), 'circuit records' (section 2), and 'district records' (section 3). Each section is then arranged around the broad categories of records that we have already discussed (those which form your sub-groups in your filing structure). For each category, the relevant 'type of record' (your series in your filing structure) is set out in column 1, with the defined retention period 'how long to keep it for' in column 2.

Many of the types of records listed will have retention periods that are defined in relation to the current connexional year (which begins on 1 September each year), plus a certain number of additional years (usually in line with some form of external regulation). You may see notes in this column that reference the actual legislation (eg Limitation Act 1980) defining this retention period.

The final column provides an instruction for each type of record, on 'what to do with it' at the end of the end of its retention period (sometimes with reference to the relevant Standing Order eg SO 015).

In some cases, the record will be retained permanently in church custody – usually because it has some form of ongoing value to church business (eg for records relating to property ownership). More commonly you will see the instruction to either 'destroy' or to 'archive' (in the latter case there may be a noted closure period during which access will be restricted, usually for data protection purposes).

Although the schedules are divided into different sections – relevant to the local church, circuit and district – the categories and types of record are generally common across all levels, and subject to similar considerations, as noted below.

Implementing the retention schedules

Although the retention schedules have been developed for you, you will need to work together, as local church, circuit and district archivists to consider how long some categories of record should be retained at your level, in line with the guidance provided.

At the very least you will retain the active records for the current connexional year, working alongside the people within your church, circuit or district who are responsible for creating them. Your background research into the types of records created, and who is involved in that process will be important here.

We will consider each category (sub-group) of records in turn:

Church meeting records will normally be kept permanently as an official record of how the Church works. The records will include agendas, papers and minutes for each meeting – whether this is a meeting of the church council, circuit meeting or district synod; of committees that report to these; or of associated youth organisations. Retention periods are measured in connexional years. Remember that while there will be multiple copies of these records (perhaps one set for everyone attending) you only need to keep one set for archive purposes – this should be the official minutes, as signed by the chair.

Employment records will be subject to external regulation and retention periods are measured in relation to the current tax year (6 April one year to 5 April the next) and the duration of employment or pension benefit. Remember that employee records should be kept safely and confidentially (see the section below relating to data protection) and that access should be restricted to individuals with responsibilities for employment matters.

Finance records are subject to external regulation, and apart from formal accounts, should be destroyed after their retention period, which is measured in accounting (connexional) years. Annual accounts will provide important historical information about how your church, circuit or district operated, and should be transferred to the archives for permanent retention. Trust deeds should also be permanently retained and kept securely in the church or circuit safe.

Membership records should for the most part only be kept for the current (connexional) year; all previous lists should be destroyed in line with data protection rules. Some pastoral records may be subject to longer retention periods if there is a safeguarding dimension.

Baptism and marriage registers should be retained permanently and transferred to the archives once a given register is no longer in use; this also applies to the circuit register of baptisms. Other records for retention as archives include church, circuit and synod directories, Sunday school rolls and registers and preaching plans.

Property records may include deeds or title documents that provide proof of ownership. They will need to be retained permanently while the property remains with the Church, and for a set period after its sale. Some of this documentation (if still in active use) may be kept at circuit level in the circuit safe, for example burial registers and associated graveyard records. Retention periods will relate to the date of the property transaction/ agreement and are set in line with commercial practice.

Archival transfers will include property agreements and leases, Methodist property logs for listed building and conservation area works, and the core records of building schemes.

Health and safety records are kept for regulatory purposes only and will normally be destroyed at the end of their retention period, which is set in relation to the date of an incident or inspection.

Safeguarding records have particular retention requirements relating to child protection rules, which mean that records of any children's activities and associated records have up to 75-year retention periods. There is a legal requirement not to destroy such material, and this takes precedence over other legislation such as data protection laws.

Data protection

Legal documents relating to data protection and copyright law will have set retention periods measured from the connexional year of their creation. Legal documentation relating to key Church business, such as trustee declarations and local ecumenical partnership agreements should however be included in archival transfers once trustees have left office or partnerships are concluded.

Minister, probationer and candidate records will normally only be retained for the lifetime of the individual concerned.

Miscellaneous/general records will include some material which should be destroyed at the end of a set period to comply with data protection rules. Other records of potential historic interest, such as the records of anniversaries and commemorations or ministers' papers relating to major church developments will be included in archive deposits.

We have made quite a few references to data protection rules, and you probably have some idea that this relates to personal data, including how this is stored and used, and for how long it is kept.

Data protection law has been around in the UK since the late 1990s. It was strengthened in 2018 in line with EU provisions under something called the General Data Protection Regulation, or GDPR for short. This was intended to build 'privacy by design' into how our personal data is processed, particularly as more and more personal information is held digitally.

You will have seen websites displaying privacy notices, you will have been asked to accept cookies, and completed forms that ask you to tick a box (or not tick a box!) to give your consent to your data being shared with third parties, and so on. This is all to do with meeting the requirements of data protection legislation, and what is now termed UK GDPR (the UK's post-Brexit version of the EU GDPR).

The Methodist Church, its local churches, circuits and districts hold a variety of personal data relating to members, employees and others. It has obligations under UK GDPR to ensure that this personal information is protected, that it is accurate, retained only for as long as necessary, and used only for the purposes for which it was collected.

What is personal information? Any information identifying a living individual or information relating to an individual that can be identified from that information. Personal data can be factual (for example, a name, email address, location or date of birth, photograph, information about a disability, health or ethnicity) or an opinion about that person's actions or behaviour.

There is a lot more that could be said here and the Church has guidance available on its website, and through resources maintained by TMCP (Trustees for Methodist Church Purposes) – see Appendix 1, link 7.

For our purposes you probably don't need to go into this in detail. What is important is that you follow key principles for managing records that contain personal information.

- Keep the records safe and private while they are still in your custody – ensure that they can only be accessed by the people who need to use them.
- Only keep them for as long as they are needed – follow the retention periods set out in the retention schedules.
- If the final action is to 'destroy' treat the records as confidential waste. Securely shred paper records and permanently delete data held on computers and as backup copies.
- Ensure that members of the Church who may have copies of records (minutes, accounts, meeting papers) while in office, return them to you for secure destruction at the end of their retention period, or when they leave office.

Remember also that while the retention schedules and the work that you are doing are important for ensuring that the Church is compliant with data protection law, this is not about destroying everything that might include personal information. The law itself recognises the need for some personal data to be retained for 'archiving purposes in the public interest', including for historical research. Where this is the case, the final retention action will still be to 'archive'.

If you have any concerns about how data protection law might apply to the records in your care, there should be a GDPR champion within each district (check your district directory or get in touch with your district administrator for contact details). They will be your first port of call. The Data Protection Officer in the Connexional Team should also be able to provide advice and support on data protection issues (to contact, see section 6).

Reviewing the records

Now you have some understanding of the role of the retention schedule, it is time to review or appraise the records to determine what needs to be kept, destroyed or transferred to the archives.

■ Appraisal

Archival appraisal is the term used by professional archivists for determining whether records have long-term value and should be retained as archives. For the most part the hard work here has been done for you – the retention schedules clearly state which records have a final action to 'archive', indicating that they should be deposited with the relevant local authority archive service.

Your focus will be on appraising the records in your care (using the retention schedules) to determine where they are at in their life cycle, and therefore what actions you need to take next:

<i>Are they still 'active' or in 'retirement'?</i>	<i>Have they reached the end of their lives/retention period?</i>	<i>Have they reached the end of their lives/retention period?</i>
<i>Do they need to remain with you – retained in local storage – for the time being?</i>	<i>Is the final action to destroy?</i>	<i>Is the final action to archive?</i>

Work your way through the records you sorted into their constituent categories (sub-groups) and types (series). Check them against the retention schedule and split them into groups according to where they are in their life cycle.

This should give you for each category and type of record:

- some which you will retain in your own filing system, because they are still active, or need to be retained in 'retirement' for a set period
- some which have reached the end of their retention period, and which have no further value, which will be destroyed
- some which have reached the end of their retention period, and which have long-term value, which will be transferred to your designated archive service.

We will look at how you prepare records for archival transfer in the next section (section 5.4 From Records to Archives) and look in more depth at what will be your ongoing work – preserving the records that are still active and which will remain in your care – in section 5.5 Current Records.

Record disposal

Those records you have identified as at the end of their retention period, which have no further value and where, therefore, the final action is 'destroy' can now be disposed of.

Before you do so, please create a disposal list recording what is being sent for destruction. This means that if anyone is looking for the records in the future, you can provide evidence of what happened to them – it also demonstrates that the destruction of records is in line with Methodist Church policy, as set out in the retention schedules.

You can extract this information from your existing summary lists, with additional columns for the disposal information – it might look something like this (a blank template version of this list can be found in Appendix 7):

Record category	Record type	Covering dates	Extent	Action	Authority	Date of destruction
Health and safety	Accident report sheets (adults)	1990–2000	1 file	Secure destruction – circuit office shredder	Retention schedule 1.6	
General records	General correspondence	2017–2023	6 email folders	Permanent deletion	Retention schedule 1.11	

This list should ideally be reviewed and signed off with colleagues, especially where you are working on your own, before you proceed to destroy the material.

Table 6: Protocol to destroy material

Church

If you are working at **local church** level, you should make contact with your circuit archivist or district archivist (if the role of circuit archivist is vacant) to agree with them procedures for destruction.

Circuit

At **circuit level**, you will contact your district archivist (if this role is vacant, you will need to speak to your superintendent minister and circuit administrator).

District

At **district level**, you should agree destruction with your district chair and the Liaison Officer for Methodist Archives.

Whatever level you are working at, any church records agreed for destruction should be treated as confidential waste.

- Paper records must be shredded – use either the circuit or district office shredder if possible.
- Digital records must be permanently deleted – delete from the original file or folder, then also from the ‘trash’ folder or ‘recycle bin’ where deleted items are then stored.

Remember that simply deleting a file will not necessarily prevent it from being recovered by an expert user. Before throwing away any computer hardware it is important to completely clear the hard drive and/or physically destroy it. The date of destruction can then be added to the disposal list.

What to Keep checklist

- Familiarise yourself with the retention schedules (*Retention schedules for Methodist Churches, Circuits, Districts and Connexionally Owned Properties*) for your area – see Appendix 1, link 6.
- Ensure that any records that contain personal information are kept safe and private while in your care.
- Review your records (using the retention schedules) to see where they are in their life cycle, and therefore what actions you need to apply.
- Sort the records into groups:
 - records that are still ‘active’ or in ‘retirement’ and which you need to keep for the time being
 - records that are at the end of their retention period, and that have no further value and can be destroyed
 - records that are at the end of their retention period, and that have long term value, for deposit with your archive service.
- Create a disposal list setting out what is to be destroyed, the action to be taken, and the authority (from the retention schedules) for that action.
- Review your disposal list with senior colleagues and ideally get them to sign off the decisions to destroy.
- Treat all records for destruction as confidential waste – securely shred all paper records and permanently delete digital records.

5.4. From Records to Archives

Those records you have identified as having reached the end of their retention period which are considered to have long-term archival value, and where, therefore, the retention schedules list the final action as to 'archive' can now be prepared for deposit with your designated local archive service.

This section will cover how you weed the records (identifying material that can be disposed of), the transfer process, and how you can add value by providing descriptions of the records to help people understand the story they tell.

Contact your archive

First make contact with the archive service that is the agreed place for the deposit of your records. This is usually the local authority archive service (sometimes known as a 'record office') for your geographical area. If you are uncertain which archive service this is, please contact the Liaison Officer for Methodist Archives for advice (see contact details in section 6).

If you are working at individual church level, contact should be made through your circuit archivist, who will be responsible for depositing the records.

As circuit or district archivists, you may already have an established relationship with your archive service. If not, contact them by email to introduce yourself – make it clear that you are authorised to act on behalf of the Methodist Church. If possible, arrange a meeting to discuss:

- the types of records you will be depositing with them
- relevant closure periods for particular types of record
- what digital formats they can accept, if you are going to be depositing digital records
- how they would like the records to be prepared physically
- what information it would be helpful for them to receive with the records.

At this point you may also be asked to sign a deposit agreement (if this hasn't already been done). This is normal practice, the Connexional archives are covered by similar agreements. Your superintendent minister or district chair should, however, be the signatory to any agreement, as they are the only individuals with the authority to withdraw records should it become necessary.

The deposit agreement will cover the terms and conditions of the deposit and what the archive service may do with the records, as well as the right of the Church to withdraw the records. Records deposited may sometimes be 'borrowed' back temporarily for display purposes or for legal reasons, provided that satisfactory arrangements can be made for their safe custody.

Closure periods are set out in Standing Order 015. Unless a record has already been made public (eg it was a public notice or printed booklet available generally, not just to church members) members of the public can only access it for 30 years after the date of the last entry. If the record contains confidential or personal information the closure period will extend to 75 years.

Once a record has been made public, especially if it can be used for family history research, people may want to make copies. Their right to do so is covered by copyright legislation and the deposit agreement should include provision for the archive service to manage this on behalf of the Church.

Copyright in all Methodist materials is vested in the Trustees for Methodist Church Purposes (TMCP). If someone wishes to publish one of our records, the archive service should refer them to TMCP. If you, or the superintendent minister concerned, receive a request of this nature, please forward it to the Senior Administrator (Heritage) who has delegated responsibility. Contact details can be found in section 6.

There is a great deal of interest among family historians in baptismal, marriage and burial records. Archive services may ask for permission to scan and digitise the registers in order to prevent wear and tear to the original documents. Commercial family history companies may also be interested in adding these registers to their online resources. Such requests should also be referred to the Senior Administrator (Heritage) in the first instance.

You can use the guidance provided in the rest of the section as a starting point for good practice on preparing a transfer of records for deposit. Do however check the details with your archive service to see if they have any particular requirements. You need to see what would be most helpful in enabling them to process your records quickly to make them accessible for researchers.

'Weeding'

You will need to examine the records to check for duplicates or material that may have been included in the files, but which do not have long-term value.

For example, 'Records of building schemes' which the retention schedules identify as destined for 'archive' could cover a number of different constituent records. Some will be of central importance – such as building plans, planning permissions, etc – but there may be other less important records included in the files (quotes for work that was not commissioned, and so on).

Such material can be weeded (removed) from the files and disposed of. If you are uncertain what can be discarded, speak to your colleagues, to the Liaison Officer for Methodist Archives, or to your contact in the archive service for further advice. Standing Order 015 states that we deposit material "deemed worthy of permanent preservation by the district archivist and recipient archivists."

As said earlier, there may be multiple copies of meeting records (perhaps one set for everyone attending). Only one (the official minutes, signed by the chair) need be transferred for archive purposes. Duplicate copies of minutes and other records which you may find in the files can be disposed of.

All duplicates and other material not deemed worthy of transfer can then be disposed of as confidential waste.

Preparing the records

The next step is to review the records intended for archive and take some basic actions to prepare them for deposit.

- **Basic preservation measures - paper records**

Some records may be in poor condition or stored in poor quality files and folders that will eventually degrade and damage the contents.

Do not attempt to repair or flatten damaged records, this is a job for trained conservators. However, there are some basic measures you can take to help preserve them.

- Group loose papers by record type in chronological bundles. Place them in labelled card folders, or secure them with unbleached cotton tying tape, with labelled slips on paper.
- Remove papers from lever arch files, plastic folders and plastic wallets (recording any relevant information from the covers or spine, in pencil, on a covering sheet of paper). Re-package with the covering sheet into labelled card folders, or tie bundles with cotton tying tape.
- Create labels for volumes from slips of paper, marked in pencil.
- Carefully remove elastic bands, coloured cotton or linen tape or string and any metal fastenings (including staples if you can do so without causing damage). Replace these with brass metal paper clips, or unbleached cotton tying tape.
- Make sure any photographs that can be identified have the relevant information written on the back in pencil.
- As you work through the records make a note of any obvious damage or issues with their physical condition.

■ **Prepare a transfer list**

The transfer list is similar to the disposal list discussed earlier. It provides an overview of the records and formally documents what is being deposited with the archive service.

Remember to ensure that the list is headed with details of the originating body: church, denomination, circuit, and district information. Label the boxes the records are transferred in with the same identifying information and a box number.

Then use the information you have already assembled to create the short list of the records, adding in any useful information on damage you have noticed to the paper records. If you are aware that any of the records contain personal or sensitive information, also include a note about this.

The resulting list might look something like this (a blank template version of this list can be found in Appendix 7):

Deposited with: <i>Name of Archive Service</i>		Date of deposit: <i>Date</i>			
Name of District:		Name of District:			
Name and denomination of Church (if applicable):					
Background notes: <i>[Include any useful background, for example, if the records derive from a district or circuit that no longer exists or a church that has closed – with dates for any changes]</i> <i>[Include the physical extent and size of the transfer – for example, number of boxes]</i> <i>[X] Church closed in [date] and was part of the former X] Methodist Circuit, [which merged into [X] Methodist Circuit in [date].</i> <i>The deposit comprises [x] boxes in total.</i>					
	Record category	Record type	Covering dates	Extent [Location]	Notes (physical condition; sensitivity)
1.	<i>Meeting Records</i>	<i>Church Council Minute Book</i>	<i>1896–1933</i>	<i>1 volume [Box 1]</i>	<i>Loose covers, some pages torn</i>
2.	<i>Meeting Records</i>	<i>Church Council Minute Book</i>	<i>1933–1974</i>	<i>1 volume [Box 1]</i>	<i>Sensitive personal information in minutes for 1972</i>
3.	<i>Finance Records</i>	<i>Accounts Book</i>	<i>1896–1903</i>	<i>1 volume [Box 2]</i>	<i>Loose pages, torn edges</i>
4.	<i>Finance Records</i>	<i>Accounts Book</i>	<i>1903–1937</i>	<i>1 volume [Box 2]</i>	

One copy will be sent to the archive service with the records, but you should also be given a copy as a receipt, so that if anyone is looking for the records in the future, you can provide evidence of what happened to them.

■ Digital record transfers

You will need to confirm with the archive service what digital formats they are able to accept and preserve. If they are unable to preserve and make accessible the format of the records you wish to deposit, then you will need to create a printed version for transfer purposes (Standing Order 015 1b).

It is particularly important that any records transferred in digital formats are easily and clearly identifiable, and that you have taken steps to weed out unnecessary documents.

A hard drive full of poorly identified digital files, with multiple drafts and duplicate versions, will be difficult for the archive service to process. Effectively this hands responsibility for deciding what is the 'official' version to the archive service. They will know less about the records than you do and will probably not have the resources to sort through such transfers in the necessary detail.

We have a duty to ensure that digital records can be effectively preserved. Prepare your digital files for deposit to the same standard as your paper records and make sure they are clearly organised, weeded and easily identifiable.

Review the records to ensure that at the point of transfer they have clear file names, to enable the archive service to understand what each file contains, and to aid future retrieval.

As previously discussed, this can be done by implementing a clear 'naming convention' for your digital documents, for example:

Organisation name – Record Category – Type of Record – Document – Date of Record

As with paper records you will need to create a transfer list which should identify by name, all the records contained on the transfer media (hard drive; flash drive; CD; etc).

Adding value

As public bodies, most archive services have to work to tight budgets. They will necessarily prioritise records that are of public interest and which will increase use of the facilities they provide. There is an opportunity, when depositing records, to provide additional information that will help the archive service to process and provide access to them.

Remember also that you are the experts here: you understand Methodism far more than the archive service will. Providing additional information is a way to 'add value' and ensure that your knowledge and understanding of the records and the context in which they were created is captured and passed on.

Speak to your contact in the archive service about what would be helpful, and how they would like this information. Most archive catalogues are now accessible online, so it may be helpful to provide this 'added value' information as an email attachment, as well as a printout with the deposit, so it can be directly copied into digital descriptions.

Your archive service may also have existing templates that they can send you with guidance on the type of information that will be useful.

In the absence of any formal guidance from the archive service, the following notes provide an overview of the type of information that could be included.

- **Provide some background about the body of records**

In 5.1 Getting Started we talked about doing some background research to help you understand the key developments in the life of your church, circuit or district, and what happened when. This information is really useful for archivists, as it provides important background and context that helps people understand the records themselves.

If you can, use the information you have gathered from your background research and from sorting through the records, to provide a 'potted history' of the area they cover. This can then be included in the 'Background notes' section of the transfer list.

It may be as simple as a few sentences, saying when a church was established, what circuits/districts it has been part of, and when it closed.

[Name] Methodist Church was first registered as a place of worship in [date]. It was originally part of the [Name] Circuit and later the [Name] Methodist Circuit, within the [Name] District. The chapel closed in [date].

[Name] Methodist Circuit is part of the [Name] District, and was formed in [date] by the amalgamation of [Name] Circuit, [Name] Circuit and [Name] Circuit. A part of [Name] Methodist Circuit was added in [date].

Or if you have more in-depth information, you could provide an expanded paragraph or two, providing additional background such as: names of founders; dates of any changes to premises; notable features of the building; dates of any development to buildings; significant activities and events; etc.

- **Provide a ‘long list’ of the records**

Your transfer list of the records you are depositing will provide some summary information about the records but, if you are able to, it will be helpful to extend this to provide a greater level of detail.

If there are any particular facts you think it would be helpful to record (eg where minutes cover the period of a major development, or where records contain important information about a notable person or movement) then add a descriptive note.

Other information that might be included could be details of any gaps in the records; names of people who appear in photographs with a note of the event/date; subjects discussed in correspondence; or types of information included in a register.

This list might look something like this (a blank template version of this list can be found in Appendix 7):

Location	Title	Description	Dates	Extent
Box 1	Church Council Minute Book	Minutes of Church Council meetings from 1 September 1896 to 3 August 1933. All minutes are signed except for those from 1915-19 where fewer meetings are recorded (during the period of the Great War). Entries for 1932 cover plans to build a new Entries for	1896–1933	1 volume

Once you have physically transferred the records to the archive service – arrange this with your contact at the archive service – you will have completed the processes for dealing with records that have reached the end of their retention periods.

In the next section, we will consider how you manage those records that will remain in your custody for the time being, or that are being created now as part of ongoing Methodist Church business.

From Records to Archives checklist

- Identify the local archive service where your records will be deposited (contact the Liaison Officer for Methodist Archives if you need advice).
- Arrange to meet with your local archive service to discuss what you need to do to deposit records with them.
- If the archive service asks you to sign a deposit agreement, refer this to your superintendent minister or district chair, as the authorised signatories.
- Check records that are to be deposited with the archive service and remove (weed out) any duplicates or material that does not have long-term value.
- Remember that you only need to transfer one copy of records such as minutes and publications for archiving purposes.
- Prepare the records for deposit by undertaking some basic preservation measures:
 - remove unsuitable storage enclosures and replace fasteners with brass paper clips or unbleached cotton tying tape
 - using pencil, label the records with relevant information (use slips of paper in volumes, label folders, or include covering sheets with bundles of records)
 - using pencil, label the back of photographs with identifying information.
- Do not attempt to repair or flatten documents – this is a job for trained conservators – but do make a note of any obvious damage or issues with their physical condition.
- Confirm with your archive service what digital formats they can accept and preserve. Prepare your digital records for deposit by ensuring they are clearly organised and easily identifiable.
- Prepare a 'transfer list' to record what you are depositing with the archive service. This will also be your 'receipt' formally documenting the transfer.
- Talk to your archive service about how you can add value by providing additional descriptive information; they may have templates you can use, or you can provide descriptive lists of your own.
- Make final arrangements with the archive service to physically transfer the records to their custody.
- Refer any subsequent requests to publish or digitise Church records to the Senior Administrator (Heritage) – see section 6 for contact details.

5.5. Current Records

The previous sections have taken you through what you need to do to establish control over the records for which you are responsible. They have helped you determine what to keep and for how long and guided you through the process of depositing records with your local archive service.

The final aspect of your role to consider is how you ensure that the records that remain in your care – those which are still in active use, or which are being created from this point forward – are looked after appropriately.

This section will explain the steps you can take to preserve these records while they are still in current use, and to make sure they survive to the end of their active lives, potentially as archives. By developing good record-keeping practices now, you will help make the job for future archivists that much easier.

We will consider the potential threats to the records. We will consider what you can do to minimise those threats for both paper and digital records while the records are still in active use and as new records are being created.

Preservation threats

For the most part the records you are dealing with will either be created on paper or in digital formats, and we will consider each of these in turn. The potential threats to the records are however broadly these:

- inherent vulnerability – poor quality paper; out-of-date software or computer equipment; data corruption
- poor storage conditions – heat; light; humidity; damp; dust
- pests – insect and rodent damage
- security – vulnerability to theft or vandalism; computer hacking, computer viruses
- catastrophe – risks of fire or flood
- human error – poor handling; lost or misplaced records.

With a bit of forward planning, the likelihood of damage or loss to your records can however easily be reduced.

■ Paper records

Paper is likely to form the bulk of your records (at least before the introduction of computerisation) and may well still be your medium of choice for current record-keeping. At the very least you may print out copies of digital records for ease of use, or for official signed copies of key documents.

The table below takes you through the issues you need to consider and the steps you can take to help ensure that your paper records can be preserved for as long as they are needed.

Inherent vulnerabilities Modern papers can vary a great deal in their quality – they are usually made from wood pulp, which is inherently acidic and becomes more so over time. From the moment it is made, paper is gradually breaking down. You have probably seen how newspapers become yellow and brittle over time (particularly if left in direct light). Newsprint paper is particularly poor quality, but all standard papers will have this in-built issue.

What can you do?

For records that don't have any long-term value this isn't really a problem, but for those records which are being created now, and which you can already identify as being of archival value, it is worth investing in archival quality paper (see Appendix 5). Work with colleagues who create the records to ensure that any new records of potential archival value are printed on a good quality permanent paper.

Physical storage Even standard paper can survive for long periods if stored appropriately. Designated archive repositories will carefully control the environmental conditions in their storage areas – temperature, humidity, light and pollution levels – to ensure that the chemical reactions within paper that increase acidity and break it down are slowed. They will also provide acid-free storage enclosures (folders and boxes) that protect the records and ensure that acid cannot migrate into the paper from other sources.

What can you do?

While the records are in your care, try to ensure that the storage area where they are kept is clean and dry, well ventilated and out of direct sunlight. Damp, humid areas with poor air circulation will encourage mould and mildew and sunlight increases the rate of chemical breakdown. Don't use harsh cleaning chemicals that could leave residues that might affect the records – damp dusting or using a vacuum cleaner is preferred.

Avoid using the following with records identified as having archival value:

- lever arch files or ring binders – these are usually made of card, plastic and metal, which will degrade over time and cause damage to the records
- plastic pockets or wallets – they degrade and release chemicals which are harmful to the records
- metal fasteners such as paperclips and staples which will rust over time. Use brass paperclips (brass metal, not brass-coloured) – see Appendix 5
- adhesive tapes, coloured cotton tape or string, and elastic bands – all have the potential to degrade and leave residues on the records. Use unbleached cotton tying tape instead.

Good housekeeping Paper can be a food source for insects and rodents; rats and mice will also shred paper for nesting material.

What can you do?

It is important to ensure that storage areas are kept clean, and regularly inspected for any signs of pest activity (dead insects, rodent droppings, etc). If you are concerned, buy pest traps to monitor insect activity (see Appendix 5).

Food should never be kept in the storage area. If possible, avoid consumption in the surrounding areas and keep them clear of waste food.

Security Risks from theft or vandalism are things you need to consider but will hopefully be mitigated by wider building security measures.

What can you do?

Talk to your property steward about how the building where your records are kept is secured and what additional measures might be taken to protect the records. The records storage area should be lockable, with access to keys restricted to authorised individuals. Important documents (such as deeds and registers) should also be kept in a safe if there is one on site.

Catastrophe Fire and flood are potentially catastrophic risks to records, resulting in either complete loss or serious damage, either from the fire, or from the water used to put it out.

What can you do?

Hopefully the building has systems in place such as fire alarms, and is well maintained. Check that everything you would expect is in place. If you have any concerns about the condition of the building talk to your property steward – small leaks for example, can soon escalate. One key precaution you can take is to keep the records off the floor and avoid storing records next to water pipes and installations.

Plan ahead

Putting together a brief 'emergency plan' summarising what you would do if there were a disaster of some kind can be really useful. Thinking through what you would need to do will help you take action without delay. See Appendix 8 for an outline template of what to include.

Remember to keep any such plan securely, as it may contain personal information, and to make sure a copy is accessible off-site, where you can access it quickly if required.

Assemble the supplies you might need in event of an emergency, so you have a small 'disaster kit' to hand should you need it (see Appendix 8).

Human error Provided the records are in good condition, you should only need to take sensible precautions while using them. However, you will need to guard against any loss or misplacement of documents.

What can you do?

Always handle documents with clean hands and treat them with care. If you show respect for the records, other people will too. Don't try to carry many heavy files at once (you may drop or damage them or hurt yourself in the process).

Don't eat or drink while using the records.

If you have older records which are clearly fragile or already torn, then you will need to minimise handling and take greater care to avoid further damage. For records of archival value, do not attempt to make any repairs yourself – adhesive tape might temporarily fix a problem, but will eventually cause further damage and staining.

Put in place a clear filing structure and follow it with care, so you are able to find the records when they are needed.

Finally, while they are in current use the records should ideally be consulted and kept on Methodist Church premises. This will ensure that they do not become confused with personal documentation, and that they remain under the control of the Church, where you can minimise the risks to their preservation.

■ **Digital records**

While paper may still form the bulk of your records, it is likely that more recent records will have been created and kept electronically. As with paper records, some of these will be of archival value.

In some instances, the original paper records may also have been scanned or digitised to put them into a digital format. If this is the case and you still have the original paper copy, make sure this is retained, as it is likely to be far more durable than the digital version.

As we will see, digital records can be challenging to preserve in the long term, and digital preservation has become something of a hot topic for professional archivists, involving a range of technical strategies and approaches.

For our purposes, we will keep this as simple and as non-technical as possible, focusing on key steps you can implement to keep your digital records secure.

Inherent vulnerabilities In today's increasingly digital world, it might seem surprising to view digital records as potentially more fragile than their paper counterparts. However, while we have paper and parchment records that are hundreds of years old, and which are still readable today, digital records from as little as ten years ago may be difficult to access. This reflects their dependence on the systems and equipment used to create and store them – and the fast pace at which this technology changes. Remember the floppy disc? How many of today's computers use these?

What can you do?

One very basic strategy you can adopt is to print out documents and keep a paper version. This may well be your preferred solution. The majority of your records will be either word processed, or spreadsheet documents, and it is relatively easy to print these out without losing any integral information.

If your records are being created and maintained digitally, it is worth planning ahead to ensure that the software formats they are created in can be preserved for the longer term, especially if the record has potential archival value.

Local archive services will take deposits of archival records in both paper and digital form, but you will need to check with them which digital formats they can accept. They should have guidance available on the software formats they can preserve, and on how they would like to receive transfers.

Inherent vulnerabilities continued

There are a number of standard 'preservation' formats that are generally accepted – these are typically open-source (non-proprietary) formats which are widely used, relatively stable, and likely to remain accessible over time. For example:

- Word-processed documents can be saved as text files (TXT) or PDFs. Text files preserve the text of the document, but not the formatting; PDFs preserve the appearance of the original document.
- Spreadsheets, eg Excel documents, can be saved in comma separated values (CSV) format. This effectively saves the spreadsheet as a text file, with each new line defining a row, and commas separating the values in each column (NB any formulas used will be lost).

Work with colleagues who create the records to ensure that any new records of potential archival value, are created in formats that your local archive service can preserve.

It is important to remember that email is also a form of documentary, even legal evidence, and is increasingly a record of the work of the Methodist Church. If emails form part of the records in your care, you may need to ask for further advice and guidance. In brief:

- emails can be printed out or saved in EML (electronic mail) format
- remember that it is important to retain details of the date, the sender and recipients, as well as the contents of the email
- if an email is likely to be required as evidence (perhaps for a legal dispute) check with your district office how it needs to be retained.

Digital storage If your records are being created and maintained digitally, you need to give some thought to your approach to digital storage. All digital data is vulnerable to corruption, whether this is caused by systems failure, storage media damage, human error, malicious intent, or disasters such as fires or floods. The general rule in the digital world is therefore, that one copy is not enough!

What can you do?

Keep at least two copies of your digital records, and ideally three, with copies held on different media in different locations. For example:

- one copy on the church computer/laptop
- one copy saved to portable media (CD, portable hard drive, memory stick) and kept in a different physical location
- one copy saved to with an approved third-party 'cloud' provider (check with your district office – this could be a service such as Google Drive or Dropbox).

Having multiple copies ensures that if the records are lost or damaged in one location, you have a back-up elsewhere.

Remember to back up your files regularly to ensure that all your copies are up to date.

It is also important to check your files at least once a year to ensure that they can be opened and are still readable.

Good housekeeping and security This isn't just about how you create and store your records – it is also about maintaining your wider computer system, and other security measures.

What can you do?

Ensure that 'system updates' for your computer, including security updates and 'patches' are downloaded regularly to protect you from hackers and malware. Your computer will probably have built-in antivirus software – ensure this is enabled and regularly updated.

Make sure your computer equipment is protected by strong passwords to prevent unauthorised access. Physically secure computer equipment when not in use – to prevent theft or unauthorised use.

Human error Perhaps the most important element for rendering your digital records usable is being able to find them! How often have you saved something to your computer, and then spent hours trying to find it because you can't remember where you saved it and what you called it?

What can you do?

Organise your digital files as you would the paper ones – save them in a logical hierarchy of folders, where you can find them when you want them. Give your files useful names! This is sometimes referred to as a naming convention, and might look something like this:

*Organisation name – Record – Type of Record – Item – Date of
Category Record*

Work with colleagues who create the records to ensure that all new records are filed and named appropriately, so they can easily be identified when needed.

Finally, the records should ideally be created and maintained on Methodist Church-owned IT equipment, not on individuals' personal computers, which are outside Church management and control.

Create documentation

It is useful to document your filing structure and state where the records that are in your care are kept. This will help you find and manage the current records you are responsible for and serve as a guide for future record-keepers. It doesn't need to be anything very complex – you need one or two pages setting out the relevant categories and types of record involved; how you file them; and where they are kept. It might look something like this (a blank template version can be found in Appendix 7).

Record category	Record type	Location	Filing note
<i>Meeting Records</i>	<i>Church Council minutes</i>	<i>Annually in folders Shelf A</i>	<i>Filed in date order</i>
	<i>. . . Committee papers</i>	<i>Annually in folders Shelf B</i>	<i>Filed in date order</i>
<i>Finance Records</i>	<i>Annual Accounts</i>	<i>Drawer 1 Filing Cabinet A</i>	<i>Annual file</i>
	<i>Financial Statements</i>	<i>Drawer 1 Filing Cabinet A</i>	<i>Filed in date order</i>
<i>Membership Records</i>	<i>Church membership lists</i>	<i>Church Computer Documents Folder 1 Membership</i>	<i>Updated annually</i>

Closures and mergers

The above measures will help ensure that your current records are kept safely and securely while they are still in your hands. However you may be faced with situations where churches are closing or where circuits, or even districts, are merging.

In these circumstances, you will need to ensure that the records that are still 'current' are transferred to their new custodian in good order. Having gone through the processes we have covered in the previous sections you should have everything you need to do this effectively.

**Table 7:
Church
closures**

Church

If you are working at **individual church level** – where the church is closing.

Once you have organised, sorted and reviewed the records and established what needs to be destroyed, and what can be deposited with your local archive service, the remaining records should be transferred to the custody of your circuit archivist (or if they are not in post, the circuit office under the superintendent minister).

Circuit

If you are working at **circuit level** – where your circuit is merging with another.

Confirm with your district archivist (or if the post is vacant, with the Liaison Officer for Methodist Archives), who will be acting as circuit archivist for the restructured circuit. The records should then be transferred to their custody.

District

If you are working at **district level** – where districts are merging into a new 'super-district'.

Work with colleagues across the merging areas to determine roles and responsibilities going forward. They may include the district chairs, other district archivists, and the Liaison Officer for Methodist Archives. The records can then be transferred to the agreed district office for the new area.

You should already have all the information you need to create a simple transfer list to capture information about the records for their new record-keeper. Ensure that all lists and the storage containers for the records themselves are clearly marked with their originating body (the name of the local church, or the predecessor circuit/district).

The lists themselves should include the following type of information (a blank template version of this list can be found in Appendix 7):

Record category	Record type	Covering dates	Extent
<i>Health and Safety</i>	<i>Accident report sheets (adults)</i>	<i>2022–24</i>	<i>1 file</i>

You should now have the information you need to help you organise the records in your care. The final section of this Handbook points you to sources of continuing advice and support and provides more information about how to keep in touch with what is happening in the Methodist Church, and in the volunteer archivist community.

Current Records checklist

- Take steps to ensure your paper records survive for as long as they are needed.
 - Work with colleagues who create records of potential archival value to ensure they are produced on archival quality paper.
 - Keep areas where the records are stored clean and dry, and make sure they are well ventilated and out of direct sunlight.
 - Regularly inspect storage areas for signs of insect or rodent activity – ensure that food is not consumed in or around record storage.
 - Record stores should be lockable and protected from unauthorised access – talk to your property stewards about security measures and access to keys.
 - Keep an eye on the condition of the building – raise any issues with maintenance or alarm systems with your property steward.
 - Keep records off the floor and avoid storage areas next to water pipes, etc.
 - Put together a brief ‘emergency plan’ and a ‘disaster kit’ for rapid response – keep a copy of the plan to hand for quick access.
 - Take sensible precautions when using records: handle with care; don’t eat or drink around the records; establish and follow a clear filing structure.
 - If possible, keep the records on Methodist Church premises.

- ❑ Take steps to ensure your digital records survive for as long as they are needed.
 - Work with colleagues who create records of potential archival value to ensure they are produced in formats capable of being preserved.
 - Keep at least two copies of your digital records, and ideally three, with copies held on different storage media in different locations.
 - Back up your digital files frequently to ensure all your copies are up to date.
 - Check your digital files regularly to ensure they open and are still readable.
 - Make sure that computer and anti-virus systems are kept up to date – install system updates and security ‘patches’ as they are issued.
 - Protect your computer equipment: keep it securely when not in use and use strong passwords to prevent unauthorised access.
 - Work with colleagues who create the records to ensure that they are filed and named appropriately, so they can easily be identified when needed.
 - If possible, ensure that records are created and maintained on Church-owned IT equipment, not on personal computers.
- ❑ Document your filing structure and where records are kept – to help you find current records, and a guide for future record-keepers.
- ❑ Where churches are closing, or circuits /districts are merging, establish who will be responsible for your current records, and prepare a simple ‘transfer list’ to capture information about the records for their new keeper.

6. Advice and Support

Remember there is always someone you can contact for advice and support.

Liaison Officer for Methodist Archives

Mary Ellis

Email: archives@methodistchurch.org.uk

Heritage & Collections Officer

Olivia Threlkeld

The Connexional Team

Methodist Church House

25 Tavistock Place

London WC1H 9SF

Tel: 020 7486 5502

Email:

ThrelkeldO@methodistchurch.org.uk

Senior Administrator (Heritage)

Liz Millard

The Connexional Team

Methodist Church House

25 Tavistock Place

London WC1H 9SF

Tel: 020 7467 5214

Email:

MillardL@methodistchurch.org.uk

Data Protection Officer

Email:

dataprotection@methodistchurch.org.uk

Connexional Conservation Officer

Email:

conservation@methodistchurch.org.uk

Keeping in touch

There are several ways to stay in touch with what is happening across the Methodist Church, and with regard to Methodist Heritage in particular.

There is a regular *Methodist Archivists' Newsletter* issued by Methodist Heritage. Send your contact details to the Heritage & Collections Officer in the Connexional Team to make sure you are signed up to the Archivists' Network which will give you access to this newsletter and an online support group which you can join if you wish.

There is also a *Heritage News* email newsletter issued every two months, which will keep you up to date with Methodist Heritage news and stories from around the connexion. To sign up for this, and a range of other free newsletters, see Appendix 1, link 8.

Appendix 1: Further Information

1. Induction Training for Methodist Archivists
methodist.org.uk/Archivists
2. Methodist Structure
methodist.org.uk/about/structure-and-governance
3. Safer Recruitment Policy and Practice Guidance
methodist.org.uk/Safeguarding/Safer-recruitment
4. Records of Methodism at a National Level
methodistheritage.org.uk/research-and-resources/researching-methodist-history
5. The National Archives 'Discovery' Catalogue
discovery.nationalarchives.gov.uk
6. Retention Schedules for Methodist Records
methodist.org.uk/for-churches/office-holders/archivists/resources-guidance-documents
7. Data Protection
methodist.org.uk/DataProtection
8. Sign Up for Newsletters
methodist.org.uk/SignUp

Appendix 2: Circuit Archivist Role Profile

The primary purpose of the circuit archivist is to support and advise circuits and churches on issues relating to records and archive management, to promote good governance and compliance, and to ensure that records are retained, deposited in local archive services if they are of archival value, or destroyed as appropriate.

This is not a role in Constitutional Practice and Discipline Standing Orders. However, the circuit archivist is an ex officio member of the circuit meeting.

Key tasks and responsibilities

- Promote the importance of records and archive management with circuit administrators, presbyters, deacons and the superintendent minister.
- Work collaboratively with locally based church officers to provide advice and support on records and archive management to ensure that the local records of the Methodist Church records are well managed.
- Consult regularly with the district archivist and discuss any issues of concern.
- Liaise, communicate and consult with the Connexional Liaison Officer for Methodist Archives.
- Appraise records following the connexional retention schedule and dispose of records in accordance with the schedule.
- Build a collaborative relationship with the local archive service(s) which hold church and circuit records and put in place arrangements for the regular deposit of core church and circuit archives. Maintain a list of records destroyed, or deposited with archive services and ensure that a receipt to acknowledge a deposit is issued.
- Maintain awareness of the General Data Protection Regulations (GDPR) and the Church's legal responsibilities on personal data and safeguarding.

- Answer queries about archives from a variety of Church and external sources. Direct queries to other sources of information, as necessary.
- Promote archives and the role they play in preserving the story and heritage of the Methodist Church.

Personal skills

- Patience and the ability to work methodically
- Ability to work on one's own initiative
- Passionate about the importance of archives
- Computer literate with access to a computer
- Willingness to travel within the circuit as needed
- A self-starter demonstrating a positive approach to tasks
- A commitment to confidentiality

Time commitment

- Appointments are made for a period of three years.
- There is an expectation that this role will involve a commitment of around 14 hours per month and will require attendance at circuit meetings.

Training and support

- The liaison officers, the Heritage and Collections Officer and the district archivist will provide support.
- Training opportunities will be provided based on identified need. Circuit archivists will be required to complete a basic programme of training in church records and records and archive management.
- Postholders must undergo Equality, Diversity and Inclusion online training (a requirement for all church postholders).
- Reasonable travelling expenses can be claimed.

Appendix 3: District Archivist Role Profile

The district archivist role is detailed in Standing Order 473 of Constitutional Practice and Discipline of the Methodist Church. The primary purpose of the district archivist is to support and advise districts, circuits and churches on issues relating to records and archive management, to promote good governance and compliance, and to ensure that records are retained, deposited in local archive services if they are of archival value, or destroyed as appropriate.

Key tasks and responsibilities

- Work collaboratively with connexional, district and circuit archivists to manage church records.
- Liaise and collaborate regularly with circuit and church archivists and provide help, information and advice on records and archive management issues including storage, security and preservation.
- Appraise records following the connexional retention schedule. Deposit archival records with the appropriate local archive service and ensure that a list of documents deposited is retained and that a receipt is issued.
- Ensure that the Methodist Heritage and Collections Officer is aware of matters relating to Methodist historic objects as needed.
- Build collaborative relationships with local archive services, ensuring that arrangements are in place for the regular deposit of core church, circuit and district archives.
- Liaise with superintendent ministers in the recruitment of circuit archivists to vacancies within the district and provide support and guidance to circuit archivists.
- Maintain an up-to-date contact list of all circuit archivists within the district and communicate any changes to the district superintendent ministers, the Liaison Officer for Methodist Archives, and the Senior Administrator (Heritage) in Methodist Church House, London.
- Maintain awareness of the General Data Protection Regulations (GDPR) and the Church's legal responsibilities on personal data and safeguarding.
- Answer queries about archives from a variety of Church and external sources. Direct queries to other sources of information as necessary.

Accountability

- This role is accountable to the Chair of the (insert name of District) District and is a member of the (Insert name of District) District Synod to which archive reports are to be regularly given to highlight relevant archives issues. A list of archives deposited with local archive services should be prepared annually.

Personal skills

- Patience and the ability to work methodically
- Ability to work on one's own initiative
- Passionate about the importance of archives
- Ability to motivate and enthuse circuit archivists
- Computer literate with access to a computer
- Willingness to travel within the district as needed
- A self-starter demonstrating a positive approach to tasks
- A commitment to confidentiality

Time commitment

- There is an expectation that this role will involve a commitment of around 20 hours per month.
- Attendance at district synod meetings and other meetings where appropriate.

Training and support

- The Liaison Officers and the Heritage and Collections Officer will support the district archivist.
- Training opportunities will be provided based on identified need. District archivists will be required to complete a basic programme of training in church records and records and archive management.
- Postholders must undergo Equality, Diversity and Inclusion online training (a requirement for all Church postholders).
- Reasonable travelling expenses can be claimed from the district.

Appointment period

- An initial six-year period appointment

Appendix 4: Heritage Objects

All local churches are likely to have collections of objects and memorabilia which have accumulated over many years – for example, the church silver, memorials, banners, artwork, musical instruments and unique items of furniture.

While these items will not form part of the documentary 'archive', they also help us to tell and share our story.

When a local church or other Methodist institution is identified for closure, you may be asked questions about the future of such moveable objects. It is important to ensure that such queries are raised with the Heritage & Collections Officer, so that appropriate steps can be taken to secure and preserve items of value to the Methodist Church.

For matters relating to historic features (war memorials, stained glass, church organs, etc.) that form part of the building fabric, especially where the building is listed, you will need to contact the Connexional Conservation Officer (see section 6 for contact details).

Further information is available on the Methodist Heritage website here:

methodistheritage.org.uk/your-church-heritage/church-objects

This includes guidance for looking after heritage objects, if you or colleagues also have responsibility for their management.

Appendix 5: Starter Kit

Before you get started, make sure you have to hand the equipment and resources you are likely to need. The list of items below are all things that you may need as you work to sort, organise and deal with the records in your care. Further detail is provided throughout section 5.

Contact your church administrator about funding for purchasing items.

Item	Suppliers
<p>Document Packaging Solid brass paperclips Unbleached cotton tying tape</p> <p>Preservation Equipment Insect traps</p>	<p>Conservation Resources conservation-resources.co.uk</p> <p>Preservation Equipment Ltd. preservationequipment.com</p> <p>CXD International: Conservation By Design cxdinternational.com</p>
<p>Protective Equipment Disposable masks (FFP3 rated) Disposable nitrile gloves Disposable polythene aprons Safety goggles Plastic dust sheets</p>	<p>B&Q diy.com</p> <p>Amazon amazon.co.uk</p> <p>Screwfix screwfix.com</p> <p>... and other DIY suppliers</p>
<p>Archival Quality Paper Loose leaf/photocopy paper Look for notebooks or printing paper that is labelled 'acid-free', 'archival', or 'permanent'. The description of this paper may also include reference to it being pH neutral or alkaline-buffered.</p>	<p>Conservation Resources conservation-resources.co.uk</p> <p>My History my-history.co.uk/acatalog/Acid-Free-Archival-Papers-and-Pens.html</p> <p>Amazon amazon.co.uk</p>

Appendix 6: Communicating Your Role

Your circuit - Managing records and archives

Good record-keeping is a valuable tool for contemporary mission. It also roots us in our past, enabling us to remember and honour the Methodist mission of our predecessors.

The records of the circuit and its local churches evidence our actions and decisions and demonstrate that we are meeting our legal responsibilities. They also tell the story of our heritage and mission for future generations.

The Church's legal framework *Constitutional Practice and Discipline (CPD)* provides formal authority to preserve records under Standing Order 015. It sets out the principle that all records deemed worthy of permanent preservation as archives "shall be deposited on permanent loan with a public authority having appropriate repository facilities". This will usually be the local authority archive service for your geographical area.

Standing Order 015 (2) further assigns "responsibility for supervising and arranging the deposit of records . . . with the responsible supervisor who shall be: (i) in relation to local church and circuit records, the church or circuit archivist, if appointed, failing who the Superintendent".

Archives and records management

Looking after record-keeping for the circuit and its constituent churches is a big task. Much of the responsibility for doing this lies with the people who create and use the records on a day-to-day basis. However, appointing someone to the role of circuit archivist, and supporting volunteer archivists at local church level, will help you to ensure that those records which need to be preserved under Standing Order 015 are identified and secured for future generations.

Working as a team, across local churches, circuits and districts, we can support each other to look after the records.

Our archivists are volunteers, giving their time to the role, so they need to feel valued and supported in what they do. While they will have access to advice and support from the Church's Archives and Records Advisory Group, they will need your support too.

How you can help

First and foremost, you can be there for your volunteer colleagues – but there are also specific actions that can help:

- provide them with a reporting framework, so that authority for decisions sits at the appropriate level
- involve them in the work of the circuit – introduce them to key officers and ensure they are invited to attend and contribute to relevant meetings and committees
- identify and allocate suitable secure space for their work and for storage of records
- provide a budget for necessary supplies and materials
- provide administrative support, eg for communicating with colleagues.

For further information see: methodist.org.uk/for-churches/property/heritage-archives-objects/archives-records-guidance

Your district - Managing records and archives

Good record-keeping is a valuable tool for contemporary mission, but also roots us in our past, enabling us to remember and honour the Methodist mission of our predecessors.

The records of the district and its local circuits evidence our actions and decisions and demonstrate that we are meeting our legal responsibilities. They also tell the story of our heritage and mission for future generations.

The Church's legal framework *Constitutional Practice and Discipline (CPD)* provides formal authority to preserve records under Standing Order 015. It sets out the principle that all records deemed worthy of permanent preservation as archives "shall be deposited on permanent loan with a public authority having appropriate repository facilities". This will usually be the local authority archive service for your geographical area.

Standing Order 015 (2) further assigns "responsibility for supervising and arranging the deposit of records . . . with the responsible supervisor who shall be: (ii) in relation to district records, the Chair". Standing Order 473 does, however, allow for the appointment (by synod) of "a district archivist whose concern shall

be to advise Circuits and Local Churches as to the proper custody or disposal of all documents and records” including responsibility “for monitoring the proper deposit of records locally”.

Archives and records management

Looking after record-keeping for the district and its constituent circuits is a big task. Much of the responsibility for doing this lies with the people who create and use the records on a day-to-day basis. However, appointing someone to the role of district archivist, and supporting volunteer archivists at circuit level, will help you to ensure that those records which need to be preserved under Standing Order 015 are identified and secured for future generations.

Working as a team, across local churches, circuits and districts, we can support each other to look after the records.

Our archivists are volunteers, giving their time to the role, so they need to feel valued and supported in what they do. While they will have access to advice and support from the Church’s Archives and Records Advisory Group, they will need your support too.

How you can help

First and foremost you can be there for your volunteer colleagues, but there are also specific actions that can help:

- provide them with a reporting framework, so that authority for decisions sits at the appropriate level
- involve them in the work of the district – introduce them to key officers and ensure they are invited to attend and contribute to relevant meetings and committees
- identify and allocate suitable secure space for their work and for storage of records
- provide a budget for necessary supplies and materials
- provide administrative support, eg for communicating with colleagues.

For further information see: methodist.org.uk/for-churches/property/heritage-archives-objects/archives-records-guidance

Appendix 7: Listing Templates

On the following pages you will find full page templates – blank copies of the listing template examples from the Handbook. You can print these out to use for creating your own lists if you wish to do so.

- 5.2 (page 34) Basic descriptive 'short list' for each 'set' of records
- 5.3 (page 53) Record disposal list
- 5.4 (page 59) Record transfer list (transfers to archive service)
- 5.4 (page 63) Enhanced descriptive 'long list' for records transferred
- 5.5 (page 76) Current records – filing guide
- 5.5 (page 77) Current records – transfer list

5.4 Record 'long' list

Location	Title	Description	Dates	Extent

Appendix 8: Emergency Plan Template

Use this template to set down a plan for what to do in the event of an emergency situation that could endanger the records. Remember to keep the final document safe and secure, as it may contain personal or confidential information, but keep copies in more than one location, and somewhere accessible in the event of disaster.

USEFUL EQUIPMENT

List here equipment that might be useful in the event of an emergency – some suggestions have been included for you. If possible, keep a small 'disaster kit' of this type of equipment to hand, so it is readily available should you need it.

Equipment	Location
Plastic sheeting (to cover records and protect them from leaks)	
Mops and buckets	
Cleaning cloths	
Paper towels	
Rubbish bags	
Plastic boxes (for moving records)	
Personal protective equipment (aprons, gloves, masks)	
First aid kit	

PRIORITIES FOR SALVAGE

List here the records that would be a priority for retrieval and salvage – these will be the records you hold that are of potential archival value, and which should be dealt with first.

Record type	Location
Baptism Register	
Marriage Register	
Burial Register	
etc.	

ACTIONS TO TAKE

Think about the possible emergency situations you might face and what actions you would need to take if they were to happen. Making notes here will give you a head start if the worst should happen.

Situation	Actions
Fire	
Flood	
Building damage	
Burglary / Theft	

AFTER THE EVENT

After the immediate emergency has been dealt with you may be left with records that are damaged or damp. Here is a checklist of actions to take.

<p>Move the records to a safe, dry, secure location – with space to deal with any problems.</p>	<p>Handle with care – support wet records and transfer them to plastic trays or boxes where their weight is supported.</p> <p>If the records are very wet, wrap them in plastic and freeze them as soon as possible to prevent mould growth (a domestic chest freezer is fine). Take advice from your local archive service about next steps.</p>
<p>Dry out lightly damp records as soon as possible – damp paper can soon become mouldy.</p>	<p>Volumes which are only a little damp can be dried standing upright. Fan out the pages and use an electric fan to direct cool air to dry the pages out.</p> <p>Loose leaf pages can be spread out to dry interleaved with clean paper towels, which should be changed frequently. If robust enough the pages can also be hung from lines.</p> <p>Do not attempt to dry items with heat – keep them cool.</p>
<p>Do not attempt to clean or repair the records.</p>	<p>Take advice from your local archive service if the records are dirty or damaged.</p>

If you would like to request this resource in an alternative format,
please contact us to discuss your needs at publishing@methodistchurch.org.uk

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