Retention schedule for Methodist records

For individual Churches

Class	Type	Retain for use	Reason	Action
Meetings	Church Council	Current connexional year + 5	Good practice	To Archive: permanent
	Meetings reporting to the Church Council	Current connexional year + 3	Included in papers of above	To Archive: after weeding
	Meetings of Youth organisations	Current connexional year + 3	Good practice	To Archive: after weeding
Employment	Employee tax and insurance records	Current tax year + 6	Statutory	Destroy
	Insurance records: employer's liability	Current tax year + 40	Statutory	Destroy
	Pension contribution records	Current tax year + 6	Limitation Act 1980	Destroy
	Contracts of employment	Current tax year + 6	Limitation Act 1980	Destroy
	Annual tax return	Current tax year + 6	Statutory	Destroy
	Expenses claims	Current tax year + 6	Limitation Act 1980	Destroy
Finance	Annual accounts	Current connexional year + 6	Limitation Act 1980	To Archive: permanent
	Cash books	Current connexional year + 6	Good practice	Destroy: unless of particular value (consult with DA)
	Cheque book/paying in slips	Current connexional year + 6	Limitation Act 1980	Destroy
	Financial statements	Current connexional year + 6	Limitation Act 1980	Destroy
	Accounts of reporting organisations	Current connexional year + 6	Limitation Act 1980	To Archive, if not included in Church accounts: permanent
	Accounts of Youth organisations	Current connexional year + 6	Limitation Act 1980	To Archive, if not included in Church accounts: permanent
	Sent rent/pew rent ledgers	Not to be retained locally	Historic records	To Archive: possibly weed
	Schedule B returns	2 years after audit	Good practice	Destroy (based on accounts)
	Covenanted giving and tax relief claims	Current tax year + 6	Statutory and HMRC guidance	Destroy
	Missionary accounts	Current connexional year + 6	Limitation Act 1980	To Archive: possibly weed
Membership	Church membership lists	Permanently, but should be reviewed annually.	CPD SO 054	Superceded copy to Archive, subject to usual 30 year rule.
	List of adherents	Permanently, but should be reviewed annually.	CPD SO 054	Superceded copy to Archive, subject to usual 30 year rule.
	Baptism registers	Whilst register, or church, in use	CPD SO 054	To Archive: permanent
	Marriage registers	Whilst register, or church, in use	Statutory	To Archive: permanent
	Burial registers	Whilst register, or church, in use	CPD SO 054	To Archive: permanent
	Sunday School rolls and registers	Whilst register in use	Good practice	To Archive: permanent
Property	Trust deeds	Now of historic interest only	Registration of Methodist property, as agreed by Conference	To Archive: permanent
	Insurance policies	40 years	Commercial practice	Destroy
	Claims correspondence	3 years after last action	Commercial practice	Destroy
	Property agreements and leases	1 year after end of agreement	Commercial practice	To Archive: permanent
	Licences for use	1 year after end of agreement	Commercial practice	To Archive: after weeding
	Church Copyright licence records	Current licence year + 6	Limitation	Destroy
	Records of lettings and use by external bodies	1 year	Commercial practice	Destroy
	Methodist property logs	Whilst log, or church, is in use	CPD SO 941	To Archive: permanent
	Quinquennial inspection reports	Hold in property log	CPD SO 941	
	Records of building schemes	Last action + 5 years		To Archive: after weeding
	Records of graveyards	Last action + 5 years		To Archive: after weeding
Health & safety	Reportable accidents/ accident book	Date of entry + 3 years	SI 1995/3163	Destroy
	Records documenting external inspections	Date of inspection + 3 years	Good practice	Destroy
Safeguarding				
General	General correspondence	Conclusion of matter + 1 year	Good practice	Destroy
	Records of anniversaries and commemorations	Date of event + 10 years	Good practice	To Archive: permanent
	Church newsletters and publications	Date of issue + 2 years	Good practice	To Archive: permanent