**Data Mapping for Managing Trustees: SAMPLE Methodist Church**

| **Document/list description** | **For what purpose is the data held?** | **What data is collected?** | **Do you have explicit consent to use the data?** | **Do you process any Special Categories of personal Data?** | **How is the data held and what security measures are in place?** | **Who holds the data and who has access to it?** | **How long is the data kept for?** | **How is the data destroyed?** | **Is any data kept by or circulated to persons outside of the Methodist Church including any Ecumenical partners?** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| *Membership of Church Council* | *Maintain record of Church Trustees for proper management of Church* | *Names, addresses, Telephone nos., e-mail addresses* | *Not needed: Lawful basis is legal requirement* | *No* | *Names displayed on Notice Board Personal data held on desktops and other devices* | *Ministers, Church Council Secretary, Church Trustees* | *Until Trustee steps down; Current Connexional Year +5* | *Electronic deletion from desktops etc; Names & roles can be kept in church archive* | *Yes - Circuit* |
| *Trustee Declarations (Safeguarding Form A and/or C)* | *Maintain record of Church Trustees for Charity Commission* | *Names, addresses, Telephone nos., e-mail addresses* | *Not needed: Lawful basis is legal requirement* | *No* | *Personal data held on password protected desktop. Trustees annual signature sheet kept at home of SO* | *Safeguarding Officer (SO)* | *Until Trustee steps down; then passed to successor or Circuit SO* | *Electronic deletion from desktop. Annual sheet of Trustees’ signatures to be shredded* | *No* |
| *Safeguarding Records* | *Ensure compliance with regulations* | *Names, addresses, email addresses, telephone numbers, Training records, Complaint records (if any)* | *Not needed: Lawful basis is legal requirement* | *Not unless contained in cases* | *Kept in electronic form on password protected desk top of Safeguarding Officer* | *Safeguarding Officer* | *For duration of office holding. Death + 75 years for confidential info* | *All paper records except annual signature sheet to be shredded after entry on desktop, and electronic deletion from desktop* | *Yes – Circuit and District* |
| *DBS Records* | *Ensure compliance with regulations* | *Names, addresses, email addresses, telephone numbers, DBS Nos, dates, & any disclosure details* | *Not needed: Lawful basis is legal requirement* | *Yes if Included in DBS disclosure details* | *Kept in electronic form on password protected desk top of Safeguarding Officer* | *Ministers, Safeguarding Officer* | *For duration of office holding. Death + 75 years for confidential info* | *Any paper records to be shredded after entry on desktop, and electronic deletion from desktop* | *Yes – Circuit and District* |
| *Church Membership List* | *Maintain record of Church Members for proper management of Church* | *Names, addresses, Telephone nos., e-mail addresses* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper lists Electronically on desktops and other devices* | *Ministers, Church Council Secretary, Pastoral Secretary* | *List of member names and church roles kept indefinitely for historical archive* | *Paper lists to be shredded Electronic deletion from desktops and other devices* | *No* |
| *Pastoral Groups* | *Maintain record of Church Members for Pastoral care* | *Names, addresses, Telephone nos., e-mail addresses birthdays Some health-related data held if offered* | *No; consent only required when health data is to be shared with others e.g. Prayer Requests* | *Yes if volunteered by member* | *Paper lists Electronically on desktops and other devices* | *Ministers, Pastoral Secretary Pastoral Visitors* | *Until person leaves or dies.* | *Paper lists to be shredded Electronic deletion from desktops etc* | *No* |
| *Mailing Lists* | *To keep members informed* | *Names, addresses, Telephone nos., e-mail addresses* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper lists Electronically on desktops and other devices* | *Ministers, Church Council Secretary, Pastoral Secretary, Pastoral Visitors* | *Until person leaves or dies.* | *Paper lists to be shredded Electronic deletion from desktop etc* | *No* |
| *Rotas and lists of volunteers* | *To arrange rotas for duties so volunteers know their duty dates* | *Names, addresses, Telephone nos., e-mail addresses* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper lists Electronically on desktops and other devices* | *Ministers, and named officials responsible for each rota. Some with names only displayed on notice boards* | *Until rota expires* | *Paper lists to be shredded Electronic deletion from desktop etc* | *No* |
| *Minutes of Church Council and Annual General Church meetings* | *To maintain a record of meetings and decisions for good management of church* | *Names of those attending, record of proceedings* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper copies displayed on notice board and in files kept by Church Council Secretary (CCS) Earlier Electronic copies kept on CCS’s desktop* | *Church Council Secretary Members of Church Council In public domain* | *Current Connexional Year +5* | *Paper copies to be shredded Electronic deletion from desktops etc* | *No* |
| *Minutes of Property & Finance Committee meetings* | *To maintain a record of meetings and decisions for good management of church* | *Names of those attending, record of proceedings* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper in files kept by Property & Finance Secretary (FPS) Earlier Electronic copies kept on CCS’s desktop* | *Property & Finance Secretary Members of P&F Committee* | *Current Connexional Year +3* | *Paper copies to be shredded Electronic deletion from desktops etc* | *No* |
| *Baptismal Registers* | *To comply with regulations* | *Baptismal Certification, name, date of birth, address* | *Not needed: Lawful basis is legitimate interest* | *No* | *Baptism Registers kept in Vestry Cupboard* | *Ministers* | *Ongoing* | *It is not destroyed* | *No* |
| *Marriage Registers & Certificate forms* | *To comply with regulations* | *Marriage Certification, names, dates of birth, addresses, occupations* | *Not needed: Lawful basis is legal requirement* | *No* | *In locked safe in Vestry* | *Ministers* | *Ongoing; Passed to Registrar when full; Church copies retained* | *It is not destroyed* | *No* |
| *List of Church Office Holders* | *To provide a list of church office holders* | *Names, addresses, telephone numbers, and e-mail addresses* | *Not needed: Lawful basis is legitimate interest* | *No[[1]](#endnote-1)* | *Data Collection consent form and Church Council Secretary’s Desktop (password protected)* | *Ministers, Church Council Secretary, Circuit Administrator, District Administrator* | *Part of Church historic record* | *Only names and church roles are archived; address, email and phone numbers are deleted* | *Yes, names, tel / e-mail published on notice boards, website and freely available from the church* |
| *Room Hirers* | *To maintain contact over changes of dates and for invoicing purposes* | *Names, addresses, telephone numbers, e-mail addresses, Bank details* | *Not needed: Lawful basis is Contractual* | *No* | *Written contract Stored on computer* | *Chairman of Property & Finance, Church Treasurer* | *1 year after booking* | *Secure shredding; electronic deletion* | *No* |
| *Key Holder Records* | *Ensure compliance with requirements of issue (Safeguarding Form D)* | *Names, addresses, email addresses, telephone numbers, DBS records (if required)* | *Not needed: Lawful basis is legal requirement* | *No* | *Kept in electronic form on password protected desk top of Safeguarding Officer* | *Safeguarding Officer* | *For duration of office / hire until return of keys* | *All paper records except annual signature sheet to be shredded after entry on desktop, and electronic deletion from desktop* | *No* |
| *Weekly / monthly Giving* | *To maintain log of amounts given to the church by individuals and to claim Gift Aid* | *Name and amount given each week* | *Not needed: Lawful basis is legal requirement* | *No* | *Kept in electronic form on password protected computer of Covenant / Envelope Scheme Secretary* | *Covenant / Envelope Scheme Secretary* | *Current Connexional Year +6* | *Paper shredder and electronic deletion from laptop* | *No* |
| *Messy Church* | *Register of attendance, parental consents, info sharing and special requirements* | *Names, addresses, Phone nos / e-mail / social media, children’s birthdays any allergies or special requirements* | *Not needed: Lawful basis is legitimate interest; consent only required if families wish to stay in touch* | *Yes if volunteered* | *Annual registration consent form kept by Messy Church Leader Electronic contact details kept on devices* | *Messy Church Leader, Ministers, WhatsApp Group* | *Until family leaves or does not re-register* | *Paper copies to be shredded Electronic deletion from desktops etc* | *No* |
| *Women’s Fellowship* | *For communication purposes* | *Names, addresses, Phone nos birthdays and any special health issues* | *Not needed: Lawful basis is legitimate interest* | *Yes if volunteered* | *Paper copies contact details kept on devices* | *President, Secretary* | *Until a person leaves or dies* | *Paper copies to be shredded Electronic deletion from devices* | *No* |
| *Every Woman* | *For communication purposes* | *Names, addresses, Phone nos birthdays* | *Not needed: Lawful basis is legitimate interest* | *No* | *Paper copies contact details kept on devices* | *President, Secretary* | *Until a person leaves or dies* | *Paper copies to be shredded Electronic deletion from devices* | *No* |
|  |  |  |  |  |  |  |  |  |  |

1. A lot of the records held reveal member’s religious belief, usually treated as a “special category” of personal data. Updated clarification of the status of such information in the context of the Methodist Church is being obtained and Managing Trustees will be informed of the outcome. For now please indicate if the data includes any **other** “special category” personal data. [↑](#endnote-ref-1)