

## Churches and Industry Group Birmingham and Solihull

### KEEPING RECORDS POLICY

1. Most workplace chaplains feel that it is helpful to keep records of their activity and encounters – not least for memory of pastoral care issues. Notes about individuals need to be kept confidentially and carefully.
2. Record keeping can help with
  - a. Remembering peoples' names and significant stories.
  - b. Remembering locations / different functions of the business.
  - c. Aiding reflection on how contacts are being developed / managed / progressed.
  - d. Gaining a self-measure of what you have been doing over the longer term, and how the chaplaincy may have changed.
  - e. Providing anonymised feedback to supporting churches, business leaders and funders.
  - f. Recording material for telling the story of chaplaincy to newcomers / outside organisations.
  - g. Aiding prayer and reflection on where God may be seen at work.
3. It is also increasingly the case that chaplaincy supporters and funders ask to see evidence of the work that is being done by paid staff and volunteers. This evidence may both be (anonymised) stories and number counts of activity. "In a world of measuring outcomes, without recorded numbers, the danger is your work become invisible". See Section 6 below about counting chaplaincy encounters.
4. CIGB has a parallel Confidentiality and Data Protection policy. It is important that confidences with individuals are kept to maintain our credibility and to keep to Data Protection rules.
  - a. Within CIGB, we understand Confidentiality to mean not sharing information with a person's colleagues or other staff in the organisation / local areas (except in extremis or with permission); but it may be ok to discuss issues with other chaplains in the local CIGB team, in order to debrief / reflect on conversations; and to discuss within a supervision setting.
  - b. Confidentiality also means taking care with any notes that are recorded, especially if there were a big concern that confidentiality had been breached if the notes were found by another person. Chaplains are recommended to use a form of coding to anonymise names within records, and to store those records carefully (eg locked drawer, password protected computer).
  - c. Data Protection principles mean that any data kept should be relevant, accurate, not excessive, stored securely, not kept for longer than necessary and only passed on in very limited cases (and usually only with consent). See the Data Policy for more guidance on this.
5. As an example, a chaplain has described how they keep their own pastoral records:
  - I carry about some notes briefly listing dates, times, locations and staff names, if known.
  - I use a code to record who the conversation has been with: eg first three letters of their name, backwards. Usually that is enough to remind me who it was.

- I jot down topics, 'health', 'manager', 'horses' or 'twin nephews', to help remember and note prayer requests.
  - I discreetly scan my notes prior to the chaplaincy and write them afterwards in a discreet place.
  - Afterwards, I look back at my notes to remind me if anything/anyone particular needs following up.
6. Chaplains are also asked to keep a brief log of how many encounters they have during a chaplaincy episode, in a format such as below (quarterly recording booklets are available from CIGB).
- a. These numbers will be aggregated to give an overall view of chaplaincy over the longer term.
  - b. They are not a measure of chaplaincy success or efficacy: some chaplaincy locations allow for more conversations than others; some chaplaincies are, by necessity, more a case of 'presence' than direct encounter.
  - c. Nevertheless, the total numbers will be used to paint part of the picture of chaplaincy to our funders and supporters.

	> 2 minutes	2 - 9 minutes	10 - 15 minutes	Longer and more serious
General life				
Working life				
Relationships at work				
Family life				
Personal health / bereavement				
Faith				
Other				