

TESTIGOS CRISTIANOS DE JEHOVÁ

Apartado postal 132 - 28850 TORREJÓN DE ARDOZ (Madrid)

DOMICILIO SOCIAL: Ctra. Torrejón a Ajalvir (M-108), km. 5 - 28864 AJALVIR (Madrid) • Teléfono: (+34) 918 879 700 • Fax: (+34) 918 879 702

September 17, 2011

TO ALL BODIES OF ELDERS

Re: Correspondence from branch office and congregation file

Dear Brothers:

This letter replaces the letters dated August 31, 2011 and September 9, 2011, to all bodies of elders. Those letters should be removed from the congregation permanent file of policy letters and be destroyed. Paragraphs 3-5 of this letter have been revised to reflect updated direction on the routing and printing of letters. Paragraph 9 has been revised to include direction on the review of *Congregation's Publisher Record* (S-21) cards by field service group overseers and assistants. Selected notations previously made in the *Shepherding* textbook will need to be updated as well.

Letters to individuals and congregations: At times, the branch office will send letters to individuals in care of the coordinator of the body of elders because of not having the mailing address of the individual. Such correspondence should be given to the addressee without being opened by the coordinator of the body of elders. Generally speaking, routine letters addressed to congregations do not need to be read to the congregation. Rather, at the next Service Meeting, an announcement may be made that a letter on that subject has been posted on the information board. Any exceptions to this direction will be noted in the postscript of the letter.

Letters to bodies of elders: It is preferred that letters addressed to bodies of elders be viewed on the jw.org Web site by each elder rather than be read as a body unless otherwise directed. Doing so limits the number of elders' meetings required and allows each elder to examine the letter in greater detail. Upon receipt of a letter to the body of elders, the coordinator of the body of elders or secretary should print two copies of the letter. The secretary can immediately place one copy in the congregation file as directed and can route the other copy to any elders who do not have access to a computer and the Internet. Once the routed copy is returned to the secretary, it should be destroyed. Of course, if each elder has confirmed that he is able to regularly view letters on the site, there is no need for a second copy of each letter to be printed and routed.

Although during the course of printing letters from the site electronic files are copied to a user's computer, such files should not be retained. Neither should individual elders compile their own library of printed letters. In most cases, it should be possible for elders to read letters from the screen rather than printing a hard copy.

Index to Letters—For Bodies of Elders (S-22): Periodically, *Index to Letters* will be revised. The coordinator of the body of elders or secretary should print one copy for the congregation file. He should also provide a copy to each elder who does not have access to a computer and the Internet. A list of letters comprising the congregation permanent file of policy letters is provided at the end of the index. Each letter in that list should be sorted in date order in the congregation file. Those letters should be kept separate from other items in the congregation file. Most congregations find it helpful to keep a separate binder of those letters with the *Index to Letters* at the front of the binder. As those letters are replaced or as new ones are added in the future, direction will be given to update the congregation permanent file of policy letters. You will likely find it helpful to update your copy of *Index to Letters* at that time as well.

We wish to offer the following caution. There are some older letters that are referred to in *Index to Letters*. In some cases those older letters contain just one or two policy matters that

currently apply. The other points in the letter may have been revised. Thus, while researching a specific point in one of the older letters, you may notice other policy matters that may or may not still apply. Therefore, exercise care in using that older direction. If those points of policy are not referred to in *Index to Letters*, it is likely because the matter has been addressed in the *Shepherding* textbook or in more recent correspondence.

Congregation file categories: Besides correspondence to be retained in the congregation permanent file of policy letters, the branch office sends annual correspondence (such as district convention instructions, guidelines for visitors to Bethel, and pioneer encouragement letters and outlines). At times, letters are sent to inform the elders or the congregation of a specific problem or temporary need. Additionally, the congregation may have paperwork regarding ownership of the Kingdom Hall, instructions for congregation accounting, and direction on requesting literature and magazines. If the branch office does not specifically direct that the correspondence should be retained in the congregation permanent file of policy letters, it will be up to the elders to determine how to file such material. If the branch office does not specifically direct how long a piece of correspondence or documentation should be retained, the elders may make the decision based on local laws and circumstances. The attached list suggests some categories that may be useful in filing material *other* than items to be retained in the congregation permanent file of policy letters. Additional categories may be used as needed.

- Accounts
- Assemblies/Conventions
- Bethel visitors information
- Circuit overseer's report on visit
- Confidential reports (sealed envelopes)
- Elders and ministerial servants
- Field service reports
- Forms
- Hospital Liaison Committee/DPA cards
- jw.org Web site
- Kingdom Hall
- Letters of introduction
- Literature/Magazines
- Miscellaneous
- Notes from elders' meetings
- Pioneers
- Regional Building Committee
- Talk outlines
- Territory

Confidentiality and security: The congregation files and records should be kept locked in a safe and secure place, preferably at the Kingdom Hall. However, if the Kingdom Hall is in any way vulnerable, then such records may be kept in the home of a responsible elder, such as the secretary, under lock and key to prevent unauthorized entry. Although the secretary is primarily responsible for the organization of the congregation file, each elder may have access to the file.—Each elder should make the following notation next to the second bullet point in paragraph 16 in chapter 2 of the *Shepherding* textbook: “See letter dated September 17, 2011, to all bodies of elders regarding updated direction on keys to congregation file.”

Field service and meeting attendance records: A box at the Kingdom Hall for collecting field service reports will continue to be used. It may be useful to the secretary in gathering the field service reports collected by the group overseers. Individual publishers may put their reports in the box at the Kingdom Hall if they desire or are otherwise unable to give them to their group overseer. The *Congregation's Publisher Record* (S-21) cards should be retained showing at least the last eight years of activity for each publisher. Cards from more than eight years ago may be destroyed except for the one signed by the publisher granting permission to keep his personal details in a file. At least the last 12 months of activity should be retained in the current file of cards. The last card of an inactive publisher should be retained in the current file indefinitely. The current file of cards should be divided into two sections—“Active” and “Inactive.” The section for active publishers should be arranged alphabetically, with the cards subdivided into sections for regular and special pioneers, baptized publishers, and unbaptized publishers. Monthly *Field Service Report* (S-4) slips, after being tabulated and posted on the

Congregation's Publisher Record cards, do not have to be retained. A record card should be filled out for the monthly totals of all publishers, auxiliary pioneers, and regular and special pioneers. Such cards, as well as meeting attendance records for the congregation, will be kept at least two years. Although the record cards are part of the congregation file, they may be kept by the secretary and made available to the other elders upon request. The field service group overseer (or servant) and his assistant should periodically review the cards of the publishers in their group with the goal of learning what each publisher's strengths and weaknesses are and then offering appropriate assistance. If the assistant is not an elder or a ministerial servant, the group overseer (or servant) should orally share the information with him, noting areas of concern.

Appointment and deletion of elders and ministerial servants: Records related to the appointment and deletion of elders and ministerial servants should be kept indefinitely.

Judicial files: After a duly appointed judicial committee has met with an individual and decided to reprove him, or to dismiss the case because of a lack of evidence, a report on the proceedings is signed by the judicial committee. (The same is true of two brothers handling wrongdoing involving an unbaptized publisher.) Such reports forms should be placed in a sealed envelope. On the front of the envelope should be listed the name of the individual, the action taken by the congregation (if any), the date of the action, and the names of the elders who handled the matter. The sealed envelope should be placed in the congregation file by the secretary. If a person has been disfellowshipped or has disassociated himself, only the S-79b card should be retained in the congregation's confidential file (once the card has been date-stamped by the branch office). The card should be placed in a sealed envelope. On the front of the envelope should be listed the name of the individual, the date of the action, and the names of the elders who handled the case. If there is a need to open these files in the future, such as in connection with a plea for reinstatement, this should be done only by the elders who are assigned by the body to handle the matter. In cases of reinstatement, the S-79b card should be taken out of the envelope and given to the congregation secretary. He will date and sign the card and send it immediately to the branch office.

Once the reinstatement has been announced, a brief report of the case should be prepared, which must include the reinstatement date along with the names of those serving on the reinstatement committee. This report should be placed in a sealed envelope. The date all restrictions are removed after reinstatement or reproof should also be noted on the outside of the envelope. No judicial information should be posted on *Congregation's Publisher Record* (S-21) cards.

After a disfellowshipped or disassociated person has been reinstated a full five years, if the judicial committee feels there is no longer any need to retain the file material, it can be destroyed. (The same applies to records involving judicial reproof.) If these brothers are not available or qualified, the determination may be made by the Congregation Service Committee or qualified elders designated by them. If there is some reason why the committee feels that it would be better to retain the material longer, it can be kept as long as necessary. If a man or a woman has entered into an adulterous marriage, the file should be kept for five years after reinstatement and thereafter at least until the death or remarriage of the innocent mate. Judicial files involving child abuse should be marked "Do Not Destroy" and should be kept indefinitely. The S-79b cards of disfellowshipped or disassociated individuals who have not been reinstated should also be kept indefinitely.

In view of the foregoing, each elder should make the following notation next to paragraphs 39 and 62 in chapter 5; paragraphs 21 and 34 in chapter 7; paragraph 2 in chapter 9;

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paragraph 13 in chapter 11; and paragraph 17 in chapter 12 of the *Shepherding* textbook: “See letter dated September 17, 2011, to all bodies of elders regarding filing confidential material.”

We trust this direction will be helpful to you as you seek to imitate our orderly God, Jehovah. (1 Cor. 14:33) Please accept an expression of our warm Christian love.

Your brothers,

Testigos Cristianos de Jehová

cc: Traveling overseers

PS to secretary: This letter should be retained in the congregation permanent file of policy letters. You may wish to update the congregation copy of *Index to Letters—For Bodies of Elders* (S-22) at this time as well.