

TESTIGOS CRISTIANOS DE JEHOVÁ

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January 6, 2017

TO ALL BODIES OF ELDERS

Re: Congregation Correspondence and Filing

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Dear Brothers:

1. This letter replaces the letters dated November 17, 2010, and September 7, 2011, to all bodies of elders and has been added to the list of policy letters cited in *Index to Letters for Bodies of Elders (S-22)*. The coordinator of the body of elders and the secretary should review this letter together. The policies outlined supplement what is outlined in the *Shepherding* textbook. Please take note of the following significant adjustments:

- Paragraph 4 contains new direction allowing the body of elders to decide whether a hard-copy file of policy letters needs to be maintained.
- Paragraph 9 contains new direction regarding the retention of letters of introduction.
- Paragraph 10 contains new direction regarding the retention of *Congregation's Publisher Record (S-21)* cards.
- Paragraph 12 contains new direction regarding the retention of the *Report on Circuit Overseer's Visit With Congregation (S-303)*.
- Paragraphs 13 and 14 contain new direction regarding the retention of congregation judicial files and other confidential reports.

2. **Confidentiality and Security:** The congregation files and records should be kept locked in a safe and secure place, preferably at the Kingdom Hall. Each elder desiring to have a key to the file should be provided one. However, if the Kingdom Hall is in any way vulnerable, then such records may be kept in a locked cabinet in the home of a responsible elder to prevent unauthorized entry.

3. **Letters to Bodies of Elders:** It is the responsibility of the coordinator of the body of elders and the secretary to ensure that all of the elders—including elders who are limited due to age or health—have access to letters to all bodies of elders. Elders who have access to jw.org are encouraged to check for new letters weekly. Elders who do not have access to jw.org should be included in a hard-copy routing of letters. There is usually no need for the elders to have a meeting to read such letters unless the letter provides specific direction to do so.

4. ***Index to Letters for Bodies of Elders (S-22)*:** A copy of *Index to Letters* should be provided to any elder who does not have access to jw.org. A list of permanent policy letters is provided at the end of the index. If

the majority of the elders are able to access jw.org, the body of elders may determine that there is no need to maintain a hard-copy file of such letters.

5. **Congregation File Categories:** For items that need to be retained in the congregation file, the following categories should be used. (Additional categories may be used as needed.)

- Accounts
- Applications
- Circuit Overseer's Report on Visit
- Confidential Records (Sealed envelopes)
- Elders and Ministerial Servants
- Hospital Liaison Committee/DPA Cards
- Kingdom Hall
- Letters of Introduction
- Territory

6. **Letters of Introduction:** When a publisher (active or inactive) moves to another congregation, a letter of introduction and the *Congregation's Publisher Record* (S-21) cards should promptly be sent to the congregation where the publisher moved. If the previous Congregation Service Committee knows where the publisher moved, the service committee may take the initiative and send these items without waiting for a formal request from the new congregation.

7. A letter of introduction should always contain the following information:

- The date of the letter
- The previous congregation's full name and complete mailing address
- The new congregation's full name and complete mailing address
- The names of the three elders (usually the Congregation Service Committee) who approved the letter
- The publisher's full name, the names of any immediate family members, and any privileges the publisher or his family members have enjoyed (such as presenting student assignments on the midweek meeting or serving as an auxiliary or regular pioneer, a local construction volunteer, or a remote Bethel volunteer), and whether the elders recommend that he retain such privileges.—*ks10* chap. 3 pars. 30-32.

8. Additionally, ask yourself: 'What information would we want to receive if this person moved into our congregation?' (Matt. 7:12) If the person was reprovved in the distant past but is not presently under restrictions, there may be no need to mention past judicial action unless the offense involved entering into an adulterous marriage or some other notorious wrongdoing.—See *Index to Letters for Bodies of Elders* (S-22) for direction regarding those accused of child sexual abuse who move to another congregation.

9. In general, the publisher's new congregation should retain the letter it received for no longer than five years. Certain situations may require that the letter be kept for a longer period of time, such as that of a publisher who has been involved in notorious wrongdoing. In a situation where an individual has entered into an adulterous marriage, the letter of introduction should be retained by the new congregation for five years; thereafter, the letter should be retained for as long as the innocent former mate is alive, is unmarried, and has not been guilty of *porneia*.—*ks10* chap. 12 par. 16.

10. **Field Service and Meeting Attendance Records:** The *Congregation's Publisher Record* (S-21) cards should be retained showing at least the last five years of activity for each publisher. Cards from more than five years ago may be destroyed. 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 record cards of a disfellowshipped or disassociated person should be retained in the sealed judicial envelope. 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. Three separate *Congregation's Publisher Record* cards should be filled out to reflect the combined monthly totals for the congregation—one for all publishers, one for all auxiliary pioneers, and one for all regular and special pioneers and field missionaries. The last two years' worth of such records, as well as meeting attendance records for the congregation, should be kept. 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 field service activity 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.

11. **Appointment and Deletion of Elders and Ministerial Servants:** Records related to the appointment and deletion of elders and ministerial servants should be kept indefinitely.

12. **Report on Circuit Overseer's Visit With Congregation (S-303):** Only the most recent report needs to be retained.

13. **Judicial Files and Other Confidential Reports:** After a judicial committee has met with an individual and decided to disfellowship him, to reprove him, or to dismiss the case because of a lack of evidence, a brief summary of the proceedings is prepared and signed by the judicial committee. (The same is true of an appeal committee, a committee handling a request for disassociation, and matters involving wrongdoing handled by one or two elders.) Any pertinent information from the personal notes of committee members should be included in the brief summary, and then the notes should be destroyed. The brief summary, along with the *Notification of Disfellowshipping or Disassociation (S-77)* form, if applicable, should be placed in a sealed envelope. Any correspondence to or from the branch office regarding the wrongdoer (or alleged wrongdoer), any correspondence from a disassociated person, any pleas for reinstatement, and correspondence related to child sexual abuse should also be placed in a sealed envelope. Further, as noted in paragraph 10, the *Congregation's Publisher Record (S-21)* cards of a disfellowshipped or disassociated person should be placed in the sealed envelope. No other material should be retained. 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, any judicial restrictions imposed, and the names of the elders who handled the matter. Files involving accusations of child sexual abuse (established or not) should be marked "Do Not Destroy." The sealed envelope should be placed in the congregation file by the secretary. 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 reinstatement date should appear on the outside of the sealed envelope along with the names of those serving on the reinstatement committee. The date all restrictions are removed after reinstatement or reproof should also be noted on the outside of the sealed envelope. If it is determined that a sealed envelope should be retained after an individual has died, the date of death should be written on the outside of the envelope. No judicial information should be posted on *Congregation's Publisher Record* cards.

14. After a disfellowshipped or disassociated person has been reinstated a full five years or dies, the confidential file material should be destroyed unless the committee believes there is a need to retain it, such as if the wrongdoing was notorious. The same applies to records involving judicial reproof and those not involving a committee. If those who handled the matter are not available or qualified, the determination may be made by the Congregation Service Committee. 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 the judicial action and thereafter as long as the innocent former mate is alive, unmarried, and has not been guilty of *porneia*. (*ks10* chap. 12 par. 16) S-77 forms on individuals who have not been reinstated should be kept indefinitely, or at least until death.

15. **Notations in the *Shepherding Textbook*:** In view of the adjustments described in this letter, each elder should make the following notations in his copy of the *Shepherding* textbook:

- In chapter 2, paragraph 16, second bullet, change existing note in margin to “See letter dated January 6, 2017, to all bodies of elders for updated direction on keys to the congregation file.”
- In chapter 2, paragraph 16, fourteenth bullet, change existing note in margin to “See letter dated January 6, 2017, to all bodies of elders for additional direction on letters of introduction.”
- In chapter 5, paragraphs 39 and 62; chapter 7, paragraphs 21 and 34; chapter 9, paragraph 2; chapter 11, paragraph 13; and chapter 12, paragraph 17, change existing note in margin to “See letter dated January 6, 2017, to all bodies of elders for direction on filing confidential material.”

Your brothers,

Testigos Cristianos de Jehová

c: Circuit overseers