



Document Management Policy & Procedures

Section 8 of the TRBC Governance Policy commits the church and its trustees to developing and maintaining a series of policy documents to support the effective running of the church. This document sets out the way in which policies will be developed and maintained.

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Section A - Policies

1 Policy statement

- 1.1 Section 8 of the TRBC Governance Policy commits the church and its trustees to developing and maintaining a series of policy documents to support the effective running of the church. This document sets out the way in which policies will be developed and maintained.

Section B - Policy Management Procedures

2 Appointed Trustee

- 2.1 Each policy will be assigned to a Trustee. That Trustee will be responsible for reviewing the policy at the allocated interval. This may be done by themselves directly or by assigning it to someone else. However, the Appointed Trustee remains responsible for approving the changes and bringing the Draft to the Trustee Meeting for discussion/approval.
- 2.2 When a Trustee retires or their responsibilities change, the policy should be reallocated to another Trustee at the next Trustee Meeting.

3 Policy Review Timetable

- 3.1 Each policy will be reviewed within two years of its previous review. However, some may be reviewed more frequently. For example: the Safeguarding Policy must be reviewed every year.
- 3.2 A timetable of these reviews, to be agreed and monitored by the Trustees, will be kept in the TRBC_Policy_Review spreadsheet (and/or the Policies Review Schedule document) stored in the **TRBC Leaders > Trustees Meetings > Trustees Agendas** folder.

4 Location/Folder Structure

- 4.1 The policies, both approved and draft, current and past, will be kept in the **Policies** folder on the **TRBC Team – General** channel of OneDrive.
- 4.2 Current policies will be kept at the root level in read-only PDF format.
- 4.3 These approved PDF versions will also be published on the TRBC website.
- 4.4 All policies under review will be stored in the **Draft policies** subfolder.
- 4.5 Track Changes should be enabled during policy reviews so that all users can easily see the suggested modifications to the policy. (NB Track Changes should be disabled before updating the filename in the first page footer (paragraph 5.5) and the Table of Contents (section 9).)
- 4.6 Once a draft policy is approved by the trustees
 - a) the approved version will be saved as a read-only PDF (using the conventions outlined in paragraph 5 below) to the **Policies** root folder
 - b) the docx version will be moved to the **Current Policies (docx versions)** subfolder.
 - c) The draft version will be moved to the **Policies\Retired Drafts** folder.
 - d) The previous version of the policy will be moved to the **Policies \ Out of Date policies** subfolder.

5 Policy Naming & Numbering

- 5.1 Policies will be named in the format *TRBC_Example_Policy_vx.x*
Underscores should be used instead of spaces.
- 5.2 Policies will be numbered with a vx.x suffix to the filename (e.g. TRBC_Example_Policy_v2.0)
If it is a new policy, then the draft versions will start at v0.1.
- 5.3 Each time a policy is reviewed, it will be saved in the Draft Policies folder with a minor number added (e.g. TRBC_Example_Policy_v2.1)
Further versions of the Draft may be numbered v2.2 or v2.3 until it is approved.
- 5.4 Once a Draft policy is approved by the trustees (or the church meeting in the case of the Governance Policy), it will be saved as the next major number (e.g. TRBC_Example_Policy_v3.0 (see Section 4.6).
- 5.5 The filename is recorded in the footer on the first page of the Standard Template (see Section 6 below). When a new version is created, use Edit Footer and Update Field to update the filename in the footer. No attempt should be made to edit the filename manually.

6 Standard template

- 6.1 When a new policy is required, it should be drafted using the Standard Template stored in the **Templates** subfolder within the **Draft policies** folder.
- 6.2 Once opened, the new document should be immediately saved in Docx format (using the filename format specified in paragraphs 5.1 and 5.2) in the Draft policies folder to avoid corruption of the template.
- 6.3 It is recommended that draft policies are edited and reviewed using the Open in App facility from Teams. This will ensure that the paragraph styles and paragraph numbering display and update correctly.

7 Paragraph styles

- 7.1 The paragraph styles within the Standard Template should be followed, observing the following hierarchy:
 - a) Title (font: Champagne & Limousines, point size: 28)
 - b) Heading 1 (for Section headings, font: Champagne & Limousines, point size: 16)
 - c) Heading 2 (for subsection headings, font: Champagne & Limousines, point size: 13)
 - d) Heading 3 (for numbered paragraph text, font: Century Gothic, point size: 10)
 - e) Heading 4 (for lettered subparagraphs, font: Century Gothic, point size: 10)
- 7.2 Further numbered or bulleted subparagraphs may be used, taking care to develop new paragraph styles and not overwrite or corrupt the paragraph styles in use in the Standard Template.
- 7.3 Note that the Heading 1, Section heading, paragraph style incorporates a page break before the heading so that each new Section begins on a new page. Where there are several short policy sections, this may not lend itself to easy reading of the policy and will result in a good deal of blank space when printing the policy. The page break maybe removed by unticking the **Page break before** box on the **Lines and Page Breaks** tab of the **Paragraph** menu, either on a paragraph-by-paragraph basis, or by modifying the Heading 1 paragraph style within the policy.

8 Cross-references

- 8.1 Where one paragraph of policy text references another paragraph within the same document, a cross-reference hyperlink should be inserted using the **References \ Cross-reference** facility within Word. These cross-references will automatically update when the **Update Field** command is used and should not be edited manually.

9 Table of Contents

- 9.1 The Standard Template incorporates a Table of Contents on the front page. This should be updated using the **Update Field** command, once the policy text has been developed. Word will pull the Section and subsection headings (paragraph styles Heading 1 and Heading 2) through into the Table of Contents automatically when the **Update Table** command is used. No attempt should be made to edit the Table of Contents manually.

Section C - Version control

Version	Comment	Date	Approved by
v0.1	First draft	22/02/2024	
v0.2	First review and inclusion of new sections	04/03/2024	
v0.3	Final review before Trustee meeting	15/07/2024	
v1.0	Approved	16/07/2024	Trustees