



Uniting Church in Australia

Historical Records Preservation Policy and Administrative Retention and Disposal Schedule

For Presbyteries

Archival Records

- All archival records will be permanently retained by the UCA Synod.
- Most archives of Presbyteries of the Uniting Church are held in their respective synod archives.

Record Title	Action Required	Examples
Minutes (including working papers, reports and agendas)	Official original, signed and confirmed records to be permanently retained and sent to Synod archives (As a guide, please send all non-current records, those older than 5 years, and/or after the last action, or on termination of a presbytery.)	<ul style="list-style-type: none"> • Presbytery Meeting minutes • Presbytery Standing Committee minutes • Presbytery Committee minutes • Board minutes • Trust minutes • Executive minutes
Correspondence (Significant)	Records to be permanently retained And sent to Synod archives (Non-current records, correspondence older than 5 years or at the conclusion of staff appointment /presbytery)	Correspondence pertaining to: <ul style="list-style-type: none"> • Pastoral issues • Financial or property transactions • letters that raise issues of policy
Policy and Procedural Documents (if not included in minutes) Newsletters and other published material	(as per Minute Schedule) Copies of all published material are best lodged periodically (every two years) in date sequence. Records to be sent to Synod archives	<ul style="list-style-type: none"> • Statements of purpose • aims and objectives • Monthly newsletters • Annual newsletters • Annual reports • Orders of services
Publicity Material	Records to be sent to Synod archives (every two years)	<ul style="list-style-type: none"> • Fund raising/ donation requests • Master copies of flyers, brochures,



		posters etc for any major event within the life of the presbytery
Photographs, films, audio and videotapes All photos should be labelled or written on with a soft pencil, with location, date and a brief description of what or who the photo depicts	Records to be permanently retained and sent to Synod archives when use is finalised	<ul style="list-style-type: none"> • Photos or videos of special events within the life of the Presbytery • Photos of presbytery buildings that are being built, altered or destroyed
Reports about special Events	Records to be sent to Synod archives when use is finalised	<ul style="list-style-type: none"> • Reports on special celebrations held by the Presbytery
Financial Records	Annual financial statement to be sent to Synod archives (every two/three years)	<ul style="list-style-type: none"> • Annual Statements only
Interim Reports	Records to be sent to Synod archives when administrative use is finalised	<ul style="list-style-type: none"> • Draft reports • Draft policy documents
Architectural Plans and Blueprints, Building Specifications Fully identified as to location, name and date	Records to be sent to the Synod archives when they are no longer required by the presbytery. NOTE: Any old/unused plans or specifications can be sent directly to Synod archives.	<ul style="list-style-type: none"> • All plans of presbytery buildings, manses, halls, toilet blocks, pathways etc

Non-Archival Historical Records

- Non-archival historical records may be retained for legal, administrative purposes, or for sentimental value, but will usually be destroyed after a period of time

Record Title	Action Required	Disposal Date	Examples
Correspondence (Insignificant)	Dispose of after 3 years	For non-significant records, 3 years after creation of record	Insignificant correspondence may include: Courtesy correspondence <ul style="list-style-type: none"> • Christmas cards • Invitations • Appointment



			confirmations <ul style="list-style-type: none"> • Other routine letters • General correspondence of a day to day nature with no lasting effect, information or consequence Transactional correspondence <ul style="list-style-type: none"> • Regarding payments etc.
Interim Records	Retain as desired for informational purposes	After 5 years or when administrative use is finalised	<ul style="list-style-type: none"> • Monthly reports to committees • Draft financial statements
Financial Records	Retain 7 years in agency records	Destroy as per accounting standards after 7 years.	<ul style="list-style-type: none"> • General financial records • Tax Documents • Invoices • Supporting correspondence

For other records such as incident reports, accident reports, Workcover and personal liability claims and all personnel records refer to your State's legal statutes. These documents are not kept as part of historical records, but may need to be permanently retained in secure storage.