Uniting Church in Australia

Historical Records Preservation Policy and Administrative Retention and Disposal Schedule

For Assembly Agencies

Archival Records

- All archival records will be permanently retained by the Uniting Church.
- Most of the Assembly Uniting Church Historical Collection is held at the Mitchell Wing of the NSW State Library. Frontier Services (and Australian Inland Mission) records are sent to the National Library in Canberra. The rest of the records are retained at “Eskdale” – the NSW Synod Archives Centre.

<table>
<thead>
<tr>
<th>Record Title</th>
<th>Action Required</th>
<th>Examples</th>
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</table>
| Minutes (including working papers, reports and agendas) | **Original, signed** records to be permanently retained and sent to Assembly archives (As a guide, please send all non-current records, those older than 7 years or on termination of an agency/commission/committee) | • Triennial Assembly minutes  
• Assembly Standing Committee minutes  
• Committee minutes  
• Board minutes  
• Trust minutes  
• Executive minutes |
| Correspondence (Significant)                      | Records to be permanently retained and sent to Assembly archives (Non-current records, correspondence older than 5 years or at the conclusion or staff appointment-agency) | Correspondence pertaining to:  
• Pastoral issues  
• Financial or property transactions  
• letters that raise issues of policy |
| Policy and Procedural Documents (if not included in minutes) | (as per Minute Schedule) Copies of all published material are best lodged periodically (every two years) in date sequence. Records to be sent to Assembly archives | • Statements of purpose  
• aims and objectives  
• Monthly newsletters  
• Annual newsletters  
• Annual reports  
• Orders of services |
| Newsletters and other published material          |                                                                                 |                                                                 |
| Publicity Material                                | Records to be sent to Assembly archives (every two years)                        | • Fund raising/donation requests |
| Photographs, films, audio and videotapes | Records to be permanently retained and sent to Assembly archives when use is finalised | • Master copies of flyers, brochures, posters etc for any major event within the life of the agency  
• Photos or videos of special events within the life of the agency  
• Photos of buildings that are being built, altered or destroyed  

| Reports about special Events | Records to be sent to Assembly archives when use is finalised | • Reports on special celebrations held by the agency  

| Financial Records | Annual financial statement to be sent to Assembly archives (every two/three years) | • Annual Statements only  

| Interim Reports | Records to be sent to Assembly archives when administrative use is finalised | • Draft reports  
• Draft policy documents  

| Architectural Plans and Blueprints, Building Specifications | Records to be sent to the Assembly archives when they are no longer required by the agency.  
**NOTE:** Any old/unused plans or specifications can be sent directly to Assembly archives. | • All plans of 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

<table>
<thead>
<tr>
<th>Record Title</th>
<th>Action Required</th>
<th>Disposal Date</th>
<th>Examples</th>
</tr>
</thead>
</table>
| Correspondence (Insignificant) | Dispose of after 3 years | For non-significant records, 3 years after creation of record | Insignificant correspondence may include: **Courtesy correspondence**  
• Christmas cards  
• Invitations  
• Appointment |
<table>
<thead>
<tr>
<th>Type of Records</th>
<th>Retention Guidelines</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interim Records</td>
<td>Retain as desired for informational purposes</td>
<td>After 5 years or when administrative use is finalised</td>
</tr>
<tr>
<td>Financial Records</td>
<td>Retain 7 years in agency records</td>
<td>Destroy as per accounting standards after 7 years.</td>
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</tbody>
</table>

**Transactional correspondence**
- Regarding payments etc.
- Monthly reports to committees
- Draft financial statements
- 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.

**National Assembly Historical Reference Committee**
**Adopted November 2005**