### 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.

<table>
<thead>
<tr>
<th>Record Title</th>
<th>Action Required</th>
<th>Examples</th>
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</thead>
</table>
| 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.) | • 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:  
• 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)                      | • Statements of purpose  
• aims and objectives |
| Newsletters and other published material           | Copies of all published material are best lodged periodically (every two years) in date sequence. Records to be sent to Synod archives | • Monthly newsletters  
• Annual newsletters  
• Annual reports  
• Orders of services |
| Publicity Material                                 | Records to be sent to Synod archives (every two years) | • Fund raising/ donation requests  
• Master copies of flyers, brochures, |
### Photographs, films, audio and videotapes

- Records to be permanently retained and sent to Synod archives when use is finalised
- Photos or videos of special events within the life of the Presbytery
- Photos of presbytery buildings that are being built, altered or destroyed

- 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

### Reports about special events

- Records to be sent to Synod archives when use is finalised
- Reports on special celebrations held by the Presbytery

### Financial records

- Annual financial statement to be sent to Synod archives (every two/three years)
- Annual Statements only

### Interim reports

- Records to be sent to Synod archives when administrative use is finalised
- 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.

### 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**
<p>|                        |                          |                                            | - Christmas cards                             |
|                        |                          |                                            | - Invitations                                 |
|                        |                          |                                            | - Appointment                                  |</p>
<table>
<thead>
<tr>
<th>Category</th>
<th>Retention Policy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interim Records</td>
<td>Retain as desired for informational purposes</td>
</tr>
<tr>
<td></td>
<td>After 5 years or when administrative use is finalised</td>
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<tr>
<td></td>
<td>Monthly reports to committees</td>
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<tr>
<td></td>
<td>Draft financial statements</td>
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<tr>
<td>Financial Records</td>
<td>Retain 7 years in agency records</td>
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<td></td>
<td>Destroy as per accounting standards after 7 years.</td>
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<td></td>
<td>General financial records</td>
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<td></td>
<td>Tax Documents</td>
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<tr>
<td></td>
<td>Invoices</td>
</tr>
<tr>
<td></td>
<td>Supporting correspondence</td>
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</tbody>
</table>

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.