The Uniting Church in Australia
QUEENSLAND SYNOD

Procedure

Presbytery & Congregation Historical Records Advice

H2.1.3

Physical Storage Best Practices

Presbyteries and congregations are asked to store physical records on their premises when possible. Storage best practices are as follows:

- Use ISO standard archiving boxes. Storage companies such as Grace, IronMountain & TIMG will sell these.
- Store archives in a dry, dark & cool location. If needed use a dehumidifier, moisture absorbers/desiccants or air conditioning in the storage space.
- Capture all stored documents in an Archive Register. Doing so allows for quicker audits and retrieval of stored archives. For a template archive register, please email records@ucaqld.com.au
- Where applicable, refer to the QLD State Government's General Retention and Disposal Schedule for retention periods.

For any further advice and assistance please contact records@ucaqld.com.au

Unfortunately, the Synod's archive storage is at capacity and at risk when heavy rainfall occurs. Presbyteries and congregations are asked to store their own physical records either on-site or by utilising a 3rd party archive storage company.

Digital Storage Best Practices

Whilst the Synod does not currently accept physical records for storage, we will happily host digital records on our SharePoint site. Presbyteries may wish to utilise this as a means of periodically backing up their digital records.

- Scan or convert finalised copies of documents into PDF format.
- When beneficial, include dates in file names in the YYYYMMDD format.

  Eg; 20100811_august_presbytery_meeting_minutes.pdf

- When archiving, retain only the most recent version of a document. Multiple, outdated versions of a document are often unnecessary.
- Use a logical file structure.

  Eg; Moreton Rivers Presbytery / Presbytery Meetings / 2020 / 01 – January / [PDFs of relevant documents]

- Before sending digital archives to the Synod, please compress the folder into .zip format to reduce its overall file size. Instructions on how to do so can be found here: Zip and unzip files - Microsoft Support

If at any point you would like further information or support in this process, please reach out to records@ucaqld.com.au

Archival Records

Record Title	Action Required	Examples
Minutes (including working papers, reports and agendas)	**Official original, signed and confirmed** records to be retained. (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. (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) Newsletters and other published material	(as per Minute Schedule) Copies of all published material are best lodged digitally & periodically (every two years) in date sequence.	Statements of purpose aims and objectives Monthly newsletters Annual newsletters Annual reports Orders of services
Publicity Material	Digital records to be sent to Synod archives (every two years)	Fundraising/ donation requests Master copies of flyers, brochures, posters etc for any major event within the life of the presbytery

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Record Title	Action Required	Examples
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 digital scans 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
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.	All plans of presbytery buildings, manses, halls, toilet blocks, pathways etc

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Non-Archival Records

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 Christmas cards Invitations Appointment confirmations Other routine letters General correspondence of a day to day nature with no lasting effect, information or consequence Transactional correspondence Regarding payments etc.
Interim Records	Retain as desired for informational purposes	After 5 years or when administrative use is finalised	Monthly reports to committees Draft financial statements
Financial Records	Retain 7 years in agency records	Destroy as per accounting standards after 7 years.	General financial records Tax Documents Invoices Supporting correspondence

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General Retention Advice

The following advice can be followed in instances where the **Archival Records** & **Non-Archival Records** advice (above) does not apply.

Church Registers and Sacramental Records	Baptismal registers	Permanent retention
	Confirmation registers	Permanent retention
	Marriage registers	Permanent retention
	Burial registers	Permanent retention
	Sacramental records (e.g., First Holy Communion, Ordination)	Permanent retention
Church Administrative Records	Constitution and bylaws	Permanent retention
	Minutes of governing body meetings	Permanent retention
	Financial records (e.g., ledgers, bank statements, receipts)	Minimum of 7 years after the last entry
	Tax-related records	Minimum of 7 years after the last entry
	Property records (e.g., deeds, leases, property surveys)	Permanent retention
	Insurance policies	Keep current policies and relevant claim records; dispose of expired policies after replacement is obtained
Church Publications and Newsletters	Bulletins and newsletters	Retain recent issues and important milestones; periodic review to remove outdated materials
	Annual reports	Permanent retention
Church Correspondence	General correspondence	Periodic review to retain significant or historically important letters; dispose of routine or non-essential correspondence
	Clergy correspondence	Permanent retention
Photographs and Audiovisual Materials	Historical photographs and slides	Permanent retention
	Audio and video recordings of significant events or sermons	Permanent retention
	Routine or non-essential photographs or recordings	Periodic review to remove duplicates or non-essential materials
Church Artifacts and Religious Objects	Items of significant historical or cultural value	Permanent retention
	Items of less significance or duplicates	Periodic review to consider deaccessioning or transferring to appropriate repositories or museums