

Recordkeeping and Archiving Guidance

1. Background

It is important to keep records to fulfil administrative and legal obligations. Good record-keeping is also a key to preserving our institutional memory. Each congregation and presbytery is responsible for keeping and maintaining key records related to their activities and governance.

The Synod Archives provides records advice to congregations and presbyteries, as well as collecting and preserving the records of Uniting Church (and pre-Union Congregational, Methodist and Presbyterian Church) congregations, presbyteries, and individuals in Victoria.

This document provides general advice and guidance for record-keeping and archiving. The Synod Archives can be contacted if you would like further advice about records management and archiving.

Synod Archives Contact details

Hours: Mon, Thurs, Fri, 9am-4pm

Email: archives@victas.uca.org.au

Telephone: 9964 4080

2. What records should be created and kept?

Many documents may be created in the course of Church activities and operations. While some documents only need to be kept while they are still being used, others need to be retained as part of the permanent records of the Church. The below list indicates 'key documents' that should be retained, and eventually archived.

- All baptism, marriage and death/burial registers
- Membership lists and rolls
- Minutes of Congregational meetings, Church Council, Elders' Council, Property and Finance committees
- Annual audited financial statements - Only annual statements need to be sent to Archives. General financial records, tax documents, invoices, bank statements, cheque butts etc. may be destroyed after 7 years, as per accounting standards.
- Selected correspondence - If it helps tell the story of your congregation or facilitates understanding of the minutes or other documents it needs to be kept permanently. If it is purely "administrative" or "operational" e.g. invoices, quotations, letters to tradespersons, it can be destroyed when it is no longer useful.
- Sunday School records (e.g. attendance rolls)
- Legal documents – constitutions, property titles, employment contracts etc.
- Building plans and specifications
- Annual reports
- Newsletters and publications such as histories, brochures, anniversary booklets
- Special service orders & bulletins (e.g. installations, dedications, anniversaries)
- Photographs and audiovisual materials (of church buildings, ministers and special events within the life of the congregation)

3. Records management tips

As records accumulate, and time passes, it can become difficult to interpret and make sense of records, especially as they become detached from their context. This is why it is important to keep records in an organised manner, with annotations where needed. Below are some key tips for record-keeping.

- Ensure physical records are kept in a secure, dry (damp-free), bug-free location.
- Keep records in archival boxes with lids, ideally grouped together by type of record and with label on box to identify contents, the name of your congregation, and the time period records within relate to. Archiving boxes are available from stationery stores such as Officeworks.
- Digital records should similarly be kept in clear and logical folder and file structures that would make sense to a person in the future and unfamiliar with the Church.
- Label individual records with the date, including the year, the name of your congregation, the place, and the event or committee.
- Ensure that photographs are identified:
 - **Printed photographs:** photocopy the photograph and write identifying information on the photocopy. Alternatively, write with a very soft pencil (4B or 6B) on the back of the photo.
 - **Digital photographs:** use folders and sub-folders to organise the images. For example, a folder for each year, a subfolder for each event. Review photos and pick key ones to retain ongoing.
- Print out hard copies of vital records – registers of baptisms, minutes and membership rolls – in addition to the electronic copies you may be creating. Printed records can be read for hundreds of years, digital records only a few years old are inaccessible if they have been created using obsolete software, or if their storage media have been scratched or damaged.
- Regularly back-up your electronic records and keep a copy of the backed-up records offsite.
- Regularly review records, ensure they are stored in a logical manner with appropriate labels, and dispose of any records that do not need to be kept on an ongoing basis. It is easiest if this is done periodically by those familiar with the records and the activities they relate to.

4. Archiving records

Archiving is an important part of the records lifecycle and ensures the key records are maintained and available to continue to provide the history of the Church and meet legal obligations. This can also be a practical solution as records accumulate and become too much to handle and store locally, or as a congregation may amalgamate or close.

Church records remain the legal property of the Uniting Church and should not be transferred to local historical societies or other organizations, with the exception of the State Library and Archives of Tasmania.

4.1 Archiving queries

4.1.1 When should records be sent for archiving?

We encourage congregations to periodically review their records and send any 'non-current' items to Archives every year or two. This prevents records piling up and becoming challenging to review and manage, both for the congregation, and the Archives.

4.1.2 Our church is closing, what should we do with our records?

An important part of the closure and sales process is the transfer of Church records to be archived. The transfer of these records ensures that important evidence of church and congregational activity is preserved for future reference.

4.1.3 Is the process the same for Tasmania and Victoria?

While the same types of material should be archived, processes for archiving varies between states.

- **Tasmania:** records for Tasmanian congregations should be archived with the State Library and Archives of Tasmania.
- **Victoria:** records for Victorian congregations should be archived with the Synod's Archive Office.

4.1.4 What about artefacts?

The Archives is not able to store large items such as church furnishings, stained glass or honour boards. However, smaller artefacts with historical significance such as communion cups, banners, ministerial regalia etc may be considered for inclusion in the collection. The Archives does not generally collect bibles or hymn books.

For honour boards commemorating war service, please contact your local or state branch of the RSL for advice.

4.1.5 What about digital records?

If key records, as outlined in section 2, are kept in digital format, these will also need to be retained by the congregation in a clear and organised manner, regularly reviewed, and eventually need to be archived.

4.2 How to arrange for archiving of physical records

As noted in 4.1.3 above, the process for archiving varies between states, however the general steps are the same, as summarised below.

| | |
|---|--|
| Step 1: Contact archives office | Contact the relevant archives office and let them know that you are planning to send records. The Archivist will be able to give you detailed information about the transfer process. Tasmania: State Library and Archives of Tasmania Victoria: Synod's Archive Office |
| Step 2: Prepare and pack records | Pack relevant records into clean, bug-free, boxes or bags which have been labelled with the name and address of the originating congregation. Archiving boxes are available from stationery stores such as Officeworks. If possible, it is helpful if these can be pre-sorted in a way that is clear what the groups of records relate to and it would make sense to a person who may be unfamiliar with the congregation. |

| | |
|--|---|
| Step 3: Transfer of records | <p>Organise the transfer of records – by courier, post or personal delivery to the relevant archives. Make sure to contact the Archives by email or telephone to confirm the date of delivery before sending.</p> <p>Regional congregations may wish to contact their presbytery to consider drop-off to the presbytery office, with the presbytery then being responsible for final delivery to the archives.</p> <p>Please note that the Synod’s Victorian Archives Office are open on Thursdays and Fridays.</p> <p>The costs of sending records to Archives must be covered by the originating congregation. Where a property is being sold, in most cases these costs will be met from the proceeds of sale.</p> |
| Step 4: Records archived | <p>The Archives team will process the records when they arrive at the Archives.</p> <p>Please note, not all records sent to archives will be archived. The Archives team will review records in line with archiving scope and will only retain those key records that align to this.</p> <p>There is a known delay for the State Library and Archives of Tasmania to process records and reflect these on their online registers.</p> |

4.3 How to arrange for archiving of digital records

As at the time of writing, there is no formal process in place for the central archiving of digital records. The Synod Archives are investigating suitable options in consultation with IT Services that may be implemented in the future as digital records of congregations age and require more formal archiving arrangements.

It is recommended that congregations continue to retain their digital records on a secure congregation device or hard drive, stored in an organised manner, with appropriate back-up processes in place. If the congregation amalgamates with another congregation, digital records should be passed on and retained by the new amalgamated congregation.

5. Document control

Review cycle: This document will be subject to formal review every 3 years.

Next review date: June 2028

Policy Manager: The Synod Archivist is responsible for the management and maintenance of this document.

Approver: Manager, Audit, Risk, and Records Management

Document management: Any minor changes made between review periods should be reflected in the below table, however, only changes of a material nature will require formal review and approval by the approver between formal review periods.

| Version | Date | Updated by | Summary of changes | Approval date |
|---------|-----------|----------------|--------------------|---------------|
| 1.0 | June 2025 | Synod Archives | Initial version | 13/06/2025 |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |