

ARCHIVES

Church Courts and Parish Organisations – Records Retention Schedule

1. What is a Records Retention Schedule?

The Records Retention Schedule is an important tool to managing the accumulation of papers that each office and group in the parish holds. The Records Retention Schedule offers guidelines as to what records to retain and for how long. *It is a timetable.*

The Records Retention Schedule assists us to maintain, safeguard and properly dispose of the useful and vital records of the church at parish, presbytery and national level.

Records Retention Schedule protects the interests of the organisation and its stakeholders by ensuring that business records are kept for as long as they are needed to meet operational needs and to comply with legal requirements, and are then disposed of securely.

2. What does a Records Retention Schedule tell us?

A Records Retention Schedule describes the content of each type of record or *record series* It suggests what records are:

- permanently and historically valuable and to be archived,
- retained for their period of usefulness, and
- identified to have no value

3. Who is to make use of the Records Retention Schedule?

It is a guideline for:

- Clerk's of Congregational Courts
- Chairpersons and secretaries of parish organisations

The Session or Parish Council appoints a Clerk whose duty it is to keep a roll of its members, take minutes of its proceedings, and take charge of its papers, books and documents. [*Book of Order ch.3:c1.63*]

4. Do I have to use the Records Retention Schedule?

Its purpose is to assist in the maintaining and retaining of important Church records. We as Church officers have a responsibility to care as well as we can for the records that we create and care for. A schedule is to protect the vital and historic records and a pattern of consistency in the care of records is necessary.

A records retention schedule is of little value unless it is applied regularly. If, after the sorting out, the schedule is then ignored, the results in the long-term will be disappointing and the problem of accumulating records will remain unsolved.

5. Can I destroy records that are not listed in the Schedule?

Not everything that comes into the hands of the minister, clerk, president or secretary is listed in the Schedule. Mail that is of an advertising nature 'junk mail' will only be of ongoing value if the group decides to pick up on the activity as a parish project. Then, a

subject file can be created and if the record adds to the significant history of the parish it is retained permanently.

No church record held by any church body, parish, Presbytery officer or official is to be gifted or disposed of in any manner without the concurrence of the Director of Archives first being obtained. [GA1985]

Recycling commitment:

The proper care of the records is everyone’s responsibility, however. Excessive duplication is costly, well managed records is expedient for our own work, for those who work with us, and for those who may need access to the records in the future.

Records Management has a commitment to ensure that all possible record material is recycled. Is the paper used on one side only? Can it be used for draft copies? Are there folders, files ringbinders that can be reused? **Shred where you can and recycle!**

6. How does the Records Retention Schedule Work?

Each Church Court and its committees and parish organisations will use the record series applicable to the records that are created by them. (See table below) e.g. All Courts, committees and parish organisations will have minute books, correspondence, and rolls or attendance lists, and the Board of Managers and parish organisations will have financial records.

The Records Retention Schedule then lists what records fall within a record series and gives guidelines as to what is to be done with a record; held permanently in the Archives, or for a period of time depending on legal or statutory requirements or for a short time only and destroyed once the primary function is served.

Series	Description
1.00	Marriage Registers, Licences, and dissolution certificates
2.00	Minutes of parish courts and organisations
3.00	Correspondence(in/outwards): For all Courts, Committees and groups
4.00	Financial Records of Deacons’ Court and Board of Managers and other groups
5.00	Human Resources & records of people employed by Congregation
6.00	Rolls and Registers
7.00	Historical Papers and Activities
8.00	Newsletters/Orders of Worship/Weekly Notices /Bulletins/Annual Reports
9.00	Property Records: Plans
10.00	Photographic images
11.00	Ephemera
12.00	Publications
13.00	Recordings – videos, tapes, DVD
14.00	Artefacts, banners, tokens etc

7. Some Examples of Parish Records

Records of Session:

Records which constitute this series are divided into eight sub-groupings:

- Minute Books
- Session Clerk's correspondence and subject files;
- Baptismal Registers and Certificate butts;
- Rolls Clerk: Communion Rolls and Attendance Registers; Transfer and Disjunction certificates/butts; Communion and Worship Service Elders Register;
- Miscellaneous Membership papers: correspondence re membership; lists of adherents; and lapsed membership rolls;
- Burial Registers
- Worship Registers
- Orders of Worship;
- Cradle Roll;
- Miscellaneous: Calls to Ministers: sermons; ministers notebooks, parish visiting records,

Records of Deacons' Court/Board of Managers

Records which constitute this series are divided into seventeen sub-groupings:

Minute Books;
Clerk's/ Secretary's correspondence: letter books;
Subject Files;
Legal documents: trustee agreements; property documents; insurance policies; loan agreements; mortgages;
Annual Reports;
Finance Committee;
Treasurer's Papers: Correspondence and Subject Files;
Cashbooks, Ledgers, and Journals;
Wage Books;
Sustentation Fund Books;
Weekly Offering Record/ Collection Books;
Pew Rental Books;
Miscellaneous Financial Records: bank books, collection/subscription lists, invoices and receipts;
Building Committee;
Property Committee;
Stewardship Committee;
Miscellaneous Committees: Picnic Committee, Fair Committee, Flower Show Committee (NOT women's group committees).

Records created by Women's Groups and Organisations:

This series is subdivided as follows:

Minute Books;
Correspondence;
Subject Files;
Financial Records;
Historical Material
Publications: Annual Reports, Constitutions, *Harvest Field*,
National Executive and Presbyterial Minutes and Publications
Photos

Records of the Sunday School

This series is subdivided as follows:

Sunday School Teachers' Minute Books;

Correspondence;
Attendance Registers;
Music;
Projects;
Ephemera;
Financial Records
Photos

Records of the Bible Classes

Records which constitute this series are divided into the following sub-groupings:

YWBC Minute Books;
YWBC Registers;
Financial Records;
YMBC Minute Books;
YMBC Registers;
Camp Committee;
YMBC Correspondence;
Joint Bible Class
Joint Bible Class Minute Books
Published Constitutions
Photos

8. *Records that have no significant value*

As a rule, the following types of records have no significant operational, informational or evidential value. They can therefore be destroyed as soon as they have served their primary purpose.

Examples

- Announcements and notices of meetings and other events, and notifications of acceptance or apologies

Transmission documents: letters, FAX cover sheets, e-mail messages, routing slips, compliments slips and similar items which accompany documents but do not add any value to them

- Message slips
- Superseded address lists, distribution lists etc.
- Duplicate documents such as:
 - Unaltered drafts
 - 'Snapshot' printouts or extracts from databases
- Working papers, where the results have been written into an official document and which are not required to support it