



## Parish/Presbytery Records Retention and Disposal Schedule

### ***What is a Records Retention and Disposal Schedule?***

- A **tool** to manage the accumulation of papers that each office/group in the parish/presbytery holds. It offers guidelines as to what records to retain and for how long.
- It **assists** us to maintain and safeguard the vital records of the church at parish, presbytery and national level and to confidently dispose of records of little long-term value.
- It **protects** the interests of the church and its stakeholders by ensuring that 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.

### ***Who is to make use of the Records Retention and Disposal Schedule?***

It is a guideline for:

- Clerks of congregational courts.
- Chairpersons/secretaries/clerks of parish organisations.

*We as church officers have a responsibility to care as well as we can for the records that we create and maintain.*

## ***How do I use the schedule?***

The schedule lists what records fall within a record series and gives guidelines as to what is to be done with a record, whether it should be held:

- permanently,
- for a period depending on legal or statutory requirements, or
- a short time only and destroyed once the primary function is served.

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

Hint: At the end of every year (calendar or financial year) assess records 5 years or older against the retention & disposal schedule and take any necessary action (archive/dispose).

## ***Can I destroy records that are not listed in the schedule?***

Not all records which are created or received by a parish/presbytery are included within this schedule. The primary aim of the retention and disposal schedule is around what records need to be retained.

If you are in doubt as to whether to keep or dispose of any material the golden rule of the Archive World applies: “If in doubt, retain!” or “Ask the Archivist!”.

*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 the Presbyterian Research Centre first being obtained [General Assembly 1985]*

## 1.0 Marriage registers, licences and dissolution certificates

It is a requirement for parishes to create and maintain records of marriages and to append any dissolution certificates they may receive to the relevant marriage in the register. Marriage registers are also an important resource for family historians.

Note: It is the duty of the marriage celebrant to complete requirements relating to marriages.

Record type	Notes/Instructions	File/Storage	Final Disposition
<b>Marriage Registers</b>  <u>Marriage Act 1955 (s. 6:35 (2))</u> <i>Any person having lawful custody of a register book shall keep the book safely, and any such person who negligently loses the book, or wilfully or negligently destroys or defaces any entry in the book, or wilfully or negligently allows any entry in the book to be destroyed or defaced while the book is in his custody, commits an offence and shall be liable on summary conviction to a fine not exceeding \$100.</i>	It is a legal requirement that the registers prior to 1996 be accessible to anyone seeking a marriage. By law registers after this date are not required to be retained by the church (The Department of Internal Affairs has taken over this legal responsibility).	The marriage register should not be left in a location that is vulnerable to any form of destruction including pests and vermin. It is best stored in an enclosed cupboard (preferably a fireproof safe) where access is limited to the main office bearers and minister.	<b>Permanent</b>  Archive 5 years after the last marriage.
<b>Marriage Dissolutions</b>	By law marriage dissolutions prior to 1996 <u>must</u> be noted on the appropriate marriage entry and the dissolution certificate adhered to the edge of the marriage. This task can be delegated by the minister to the parish secretary or session member.		<b>Permanent</b>  <i>Marriage registers deposited with PRC Archive? – Send dissolution certificates to the Archive. The archivist will attach the certificates to the marriage entry.</i>
<b>Marriage Licenses</b>	These are generally personal to the celebrant and do not necessarily end up in the parish collection.	If the parish does hold a number of these, gather together in a file and label. Files should be stored in a suitable filing box.	<b>Permanent</b>  Archive 5 years after marriage.  <i>Depositing with PRC Archive? - Send these together with the marriage registers.</i>

## 2.0 **Minutes:** of Session, Deacons' Courts/Board of Managers or Parish Councils, Women's Organisations and other groups within the Parish where records are created and maintained.

Minutes provide important evidence and insights into the life and functions of a parish/presbytery. They may also be required to provide proof of actions or decisions.

It is the responsibility of each congregation/presbytery clerk to ensure that minutes of meetings are accurately recorded and those present listed (Book of Order 2012, sec. 7.18, 8.12).

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Minutes</b>  Includes: <ul style="list-style-type: none"><li>• draft minutes</li><li>• formal minutes</li><li>• minutes of annual meetings</li><li>• agenda's</li><li>• meeting papers</li><li>• reports</li></ul>	Ensure that ALL meeting papers are stored with the minutes (eg. reports to the meeting, pamphlets, agenda etc).  <b>Presbytery:</b> Once published, one copy of the meeting papers, reports and minutes are to be forwarded to the Presbyterian Research Centre (Archive).	<b>Minute books:</b> These should <u>not</u> be stored on private property but retained onsite at the church. Records retained on private property are placed at risk and are not covered by the church's insurance.  Volumes in good condition can be stored upright, damaged volumes are best stored flat  <b>Electronic minutes:</b> For minutes, it is still currently a requirement to have one printed and signed record of each meeting. Ideally, printed minutes should be stored in a folder/file (hole-punched or slipped into clear file pockets). Do <u>not</u> use staples, use plastic paper clips instead.	<b>Permanent</b>  Archive 5 years after last entry.

### 3.00 Correspondence (in/outwards) and subject files: For all courts, committees and church organisations

Together with minutes, correspondence and subject files provide important insights and evidence of the functions and rolls of the parish/presbytery.

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Correspondence</b></p> <p>This can be in the form of:</p> <ul style="list-style-type: none"><li>• letters</li><li>• facsimiles</li><li>• files notes following telephone conversations</li><li>• emails</li></ul> <p>Includes <u>both</u> inwards and outwards correspondence.</p>	<p>Use a filing system that is uniform and easy to follow.</p> <p>File by date or subject. Do <u>not</u> file alphabetically!</p> <p>If correspondence is of a restricted nature (eg. legal issues), separate off into a different file, label and restrict access.</p> <p>Dispose of any routine memos and mail-outs as well as any “for your information” emails.</p> <p><b>Paper-based:</b> File inwards letters and responses together.</p> <p><b>Electronic (emails):</b> In your email programme create sub-folders underneath the inbox by year and/or subject. Drag-and-drop emails into this (from <u>both</u> the inbox and sent items!).</p>	<p><b>Paper-based:</b> These can be stored in ring binders, storage filing boxes or folders. Clearly label the folder/file with any dates/subjects eg. “St. Andrews Parish Board of Managers correspondence 2014”.</p> <p>Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Emails can be temporarily managed in the email programme (such as Microsoft Outlook). Create folders underneath the inbox by year or subject eg. “Parish Council 2014” or “Sunday School Camp 2014”.</p> <p>Create and retain computer generated letters in folders with the same heading on a computer.</p> <p>At the end of each year copy the emails in your email programme from that year/subject into the relevant folder on the computer.</p>	<p><b>Permanent</b></p> <p>Archive after 5 years (from last date or from when subject file closed).</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Subject Files</b></p> <p>These may include:</p> <ul style="list-style-type: none"> <li>• policy statements</li> <li>• correspondence</li> <li>• planning documentation</li> <li>• reviews</li> <li>• hall bookings</li> <li>• pamphlets</li> </ul>	<p>Selective retention, remove:</p> <ul style="list-style-type: none"> <li>• routine letters</li> <li>• drafts if final documents present</li> <li>• any other document which was not central to the subject/issue.</li> </ul> <p>Ensure any personal and sensitive record is noted as restricted and placed in a separate file. Retain with the subject file and flag.</p> <p>Label each subject file with the title of the subject and the date of opening and closing. e.g. "St Andrews Session Retreat 1980-89".</p>	<p>See above.</p>	<p><b>Permanent</b></p> <p>Archive after 5 years (from last date or from when subject closed).</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>

## 4.0 Financial Records: for Deacons' Courts, Boards of Managers, Parish Councils, and Presbyteries.

The church and its various bodies are bound by the requirements of the Financial Reporting Act 2013, which is iterated throughout the Book of Order 2012 (sec. 5.2, 7.12, 16.8, 16.10).

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Minor (routine) financial records</b> <ul style="list-style-type: none"> <li>• Invoices</li> <li>• Cheque butts</li> <li>• Deposit slips</li> <li>• Bank statements (monthly)</li> <li>• Bank reconciliations</li> <li>• IRD/GST</li> <li>• Copy receipts</li> <li>• Payment requests</li> </ul>	<p>Legally these papers are to be retained by the parish/presbytery for between 5 to 7 years.</p>	<p><b>Paper-based:</b> Retain in clearly marked files/folders in the order of payment. Date and label the contents and also note the date of disposal.</p> <p><b>Electronic:</b> Save emails containing invoices/receipts/payment requests in a folder underneath the inbox for each year eg. "Financial Transactions 2014". For transactions which occur via your bank, your online banking system will retain all evidence of electronic transactions for 7 years. The bank – so to speak – is your records manager for these records!</p>	<p><b>Dispose</b></p> <p>Destroy all paper-based and delete any electronic routine financial records (if you have saved any to your computer) after 7 years.</p>
<b>Major financial records</b> <ul style="list-style-type: none"> <li>• Wage Books</li> <li>• Weekly Offering Books</li> <li>• Beneficiary record</li> <li>• Payroll registers</li> <li>• Stewardship material and programmes</li> <li>• Cash books</li> <li>• Journals</li> <li>• Ledgers</li> <li>• Annual bank statements</li> </ul>	<p>Most of these are forms of old paper-based financial recordkeeping.</p> <p>Stewardship material is worth retaining as it tells of an historical moment and process of financing. Keep as subject material, label and date.</p>	<p>These should <u>not</u> be stored on private property but retained onsite at the church. Records retained on private property are placed at risk and not covered by the church's insurance.</p> <p>Place any loose records in folders which are clearly marked with the type and date range of the records.</p> <p>Volumes in good condition can be stored upright, damaged volumes are best stored flat.</p>	<p><b>Permanent</b></p> <p>Archive 7 years after last entry.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Treasurers Papers</b></p> <p>This can include:</p> <ul style="list-style-type: none"> <li>• Correspondence</li> <li>• Subject files</li> <li>• Reports</li> </ul>	<p>Not all of the treasurer's papers need to be retained.</p> <p>Remove routine letters and retain substantive letters.</p> <p>Ensure any personal and sensitive record is noted as restricted and placed in a separate file.</p>	<p><b>Paper-based:</b> Can be stored in ring binders, storage filing boxes or folders. Clearly label the folder/file with any dates/subjects.</p> <p>Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Emails can be temporarily managed in the email programme (such as Microsoft Outlook). Treasurers should create a dedicated folder underneath their inbox for all correspondence associated with their role eg. "St Andrews Treasurer 2014".</p> <p>Create and retain computer generated letters/memos in a folder on a computer with the same label.</p> <p>At the end of each year copy the emails from that year/subject into the relevant folder on the computer.</p> <p>If your parish has a secretary or clerk responsible for records, provide him/her with the contents of the folder (via CD/DVD/USB stick) to be saved alongside other electronic records of the parish.</p>	<p><b>Permanent</b></p> <p>Archive after 5 years.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>



Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Budget Preparation</b>  Can include the following: <ul style="list-style-type: none"> <li>Papers relating to budget preparation</li> <li>Approved budgets</li> <li>Long /short term schedules and strategies.</li> <li>Correspondence.</li> </ul>	<p>After the budget is approved the primary value for these records is the development of next year's budget.</p> <p>Retain:</p> <ul style="list-style-type: none"> <li>final budget</li> <li>short- and long-term schedules and strategies</li> <li>correspondence</li> </ul>	<p><b>Paper-based:</b> Stored in ring binders or storage filing boxes or folders. Clearly label the folder/file with any dates/subjects. Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Create and retain computer generated spreadsheets/letters/memos in a folder on a computer labelled with the year and/or subject eg. "St Andrews Budget 2013-2014". Emails can be temporarily managed in the email programme (such as Microsoft Outlook). At the end of each year copy the emails from that year/subject into the relevant folder on the computer.</p>	<p><b>Permanent (Final Budget + papers)</b>  Archive 5 years after last date.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p> <p><b>Dispose (Working/Preparation papers)</b>  Destroy after 3 years.</p>
<b>Audit Reports</b> <ul style="list-style-type: none"> <li>Trial Balance</li> <li>Annual Accounts</li> <li>Audited Accounts</li> </ul>	<p>Due to the non-proprietary nature of accounting software, create hard copies of reports. These are the archival copies.</p> <p>Keep original copies and one printed copy of Annual Financial Statements.</p>	<p><b>Paper-based:</b> Store in ring binders, filing boxes or folders which are clearly labelled with the subject and dates eg. 'St Andrews Annual Accounts 2010-2014'.</p> <p><b>Electronic:</b> If accounts are electronically maintained prepare to migrate your database from one generation of hardware and software to another when the earlier version becomes redundant. This can avoid information becoming lost because it cannot be read.</p>	<p><b>Permanent</b>  Archive after 7 years.</p>

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Application for funds</b></p> <p>Can include:</p> <ul style="list-style-type: none"> <li>• Copies of grant forms</li> <li>• Correspondence</li> <li>• Interpretative material</li> </ul>	<p>These records fall into two categories:</p> <ol style="list-style-type: none"> <li>1. Unsuccessful applications.</li> <li>2. Successful applications.</li> </ol> <p>Both are useful to retain in the short to medium term if other applications are filed.</p>	<p><b>Paper-based:</b> Stored in ring binders or storage filing boxes or folders. Clearly label the folder/file with any dates/subjects. Eg. "St Andrews Bible Class camp Grant application 2010".</p> <p>Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Create and retain computer generated spreadsheets/letters/memos in a folder on a computer labelled with the year and/or subject eg. "St Andrews Bible Class camp Lions Grant application 2010".</p> <p>Emails can be temporarily managed in the email programme (such as Microsoft Outlook) in a folder underneath the inbox labelled with the date/subject.</p> <p>At the end of each year copy the emails from that year/subject into the relevant folder on the computer.</p>	<p><b>Dispose (Unsuccessful Applications)</b></p> <p>After 6 years.</p> <p><b>Permanent (Successful applications)</b></p> <p>Archive after 5 years.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>

## 5.0 Human Resources - Policies & Personnel records: for persons employed by the Session/Deacons' Court/Board of Managers/Presbyteries

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Individual Employees</b>  Can include: <ul style="list-style-type: none"> <li>• Applications</li> <li>• C.V's and letters of commendation</li> <li>• Performance reviews</li> <li>• Correspondence</li> <li>• Continuing education documentation</li> <li>• Any newspaper clippings that relate to the person in their employ</li> <li>• Discipline documentation</li> </ul>	<p>The records of anyone employed by the parish as lay ministers or youth workers are governed by policy set by the Human Resources Policy of the PCANZ.</p> <p>All records pertaining to an individual need to be retained on site until one year after he/she leaves.</p> <p>After this, only biographical history and the duration of the employment need to be retained.</p> <p>For unsuccessful candidates, return the application documentation to the applicant.</p> <p>Any disciplinary files need to be forwarded to the Presbytery &amp; Assembly Executive Secretary (AES).</p>	<p>Any files retained for the employee must be kept in strictest confidence.</p> <p><u>Note:</u> Follow PCANZ regulations regarding disciplinary and complaint files. Ensure the privacy of these papers.</p> <p><b>Paper-based:</b> Store in a locked cupboard onsite at the church.</p> <p><b>Electronic:</b> Save in a folder on the computer of the person responsible for staff at the parish/presbytery.</p>	<p><b>Permanent</b></p> <p><i>Depositing at the PRC Archive?</i> - Once archived these records are under restricted access for 75 years after closure of the file or 10 years after the death of the person or at the Archivist's discretion.</p> <p><i>Depositing electronic copies with the PRC Archive?</i> – Burn these onto a disc (CD/DVD) and send to the Archive.</p> <p><u>Note:</u> ensure all archived employee records do <u>not</u> contain documentation of unsuccessful candidates.</p>
<b>Policies</b>  Includes PCANZ policy documents such as: “Employing Staff”, “Health & Safety”.	<p>Keep for as long as they are needed.</p>		<p><b>Dispose</b></p> <p>Once superseded by new laws and acts.</p>

## 6.0 **Rolls and Registers:** including Membership, Baptismal, Communion, Attendance for ALL Organisations

One of the key requirements for the church as a whole, but especially parishes and presbyteries, is to create and maintain accurate rolls and membership records (Book of Order 2012). Here are some important things to be aware of:

- Specific tasks relating to rolls and registers may be delegated by the session/parish clerk/secretary.
- Rolls should be revised annually.
- Presbytery may ask to see the rolls at the time of the Quinquennial Visitation.
- Keep a list of families under pastoral care.
- Some PCANZ and Presbytery levies are based on parish roll numbers – it pays to be accurate.
- The minister's name should be on the Communion Roll.
- Communicant and adherent numbers are required each June for official compilation of the national statistics.

Record Type	Instructions	File/Storage	Final Disposition
<b>Membership &amp; Communion Rolls</b>	Retain all rolls from all organisations.	<p><b>Paper-based:</b> Store onsite at the church. Bound volumes to be stored upright or flat if damaged. If loose, stored in ring binders, filing boxes or folders. Clearly label the folder/file with any dates/subjects. Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Create and retain computer generated rolls in a folder on a computer labelled with the year and/or subject eg. "St Andrews Membership". Use a clear file name for each individual roll which identifies the subject and date eg. "St Andrews_communion roll_2010 to 2014".</p>	<p><b>Permanent</b></p> <p>Archive 5 years after completion.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>

Record Type	Instructions	File/Storage	Final Disposition
<b>Cradle Rolls</b>	In the past this roll was retained for all children baptised and their birthday remembered. Once they commenced Sunday School their name was removed.	If the roll is a wall chart ensure this is stored flat and out of direct sunlight.	<b>Permanent</b>  Archive 5 years after completion.
<b>Directories/Newsletter lists</b>	Keep one copy of each list/directory for each year.	<p><b>Paper-based:</b> Store onsite at the church. Bound volumes to be stored upright or flat if damaged. If loose, stored in ring binders, filing boxes or folders. Clearly label the folder/file with any dates/subjects. Do <u>not</u> use staples, use paper clips instead.</p> <p><b>Electronic:</b> Create and retain computer generated directories/lists in a folder on a computer labelled with the year and/or subject e.g. "St Andrews Directories". Use a clear file name which identifies the subject and date of each list e.g. "St Andrews Member directory_2010 to 2014".</p>	<p><b>Permanent</b>  Archive 5 years after completion.</p> <p><i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i></p>
<b>Attendance &amp; Membership Rolls</b>  Including women's groups, Bible Class and Sunday Schools.	These registers are useful for researchers looking for members of their family who attended various groups in the past. Where possible they should be gathered together.	Often these registers are small and can become misplaced. Store together in a filing box.	<b>Permanent</b>  Archive 5 years after completion

## 7.00 Historical Papers and Activities

These provide interesting insights into the life and celebrations of a parish/organisation and often include historical summaries, notable events and lists of past members.

Record Type	Notes/Instruction	File/Storage	Final Disposition
<b>Anniversary Papers:</b>  Can include: <ul style="list-style-type: none"> <li>• Committee minutes</li> <li>• Activities and papers</li> <li>• Anniversary services</li> <li>• Invitations</li> <li>• Correspondence</li> <li>• Orders of worship</li> <li>• Historical narratives</li> <li>• Videos and memorabilia.</li> </ul>	It is worthwhile collecting together all items relating to a particular celebration.	<b>Paper-based:</b> Store onsite at the church. Bound volumes to be stored upright or flat if damaged. Loose items can be stored in filing boxes, folders or large envelopes. Clearly label the folder/file with any dates/subjects. Do <u>not</u> use staples, use paper clips instead.  <b>Electronic:</b> Create and retain computer generated documents in a folder on a computer labelled with the year and/or subject eg. "St Andrews 150th celebrations". Also drag-and-drop emails associated with the celebration into this folder.	<b>Permanent</b>  Archive 2 years after celebrations.  <i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i>
<b>Financial Papers in connection with celebrations:</b> <ul style="list-style-type: none"> <li>• Invoices &amp; Receipts</li> <li>• Bank Books</li> <li>• Income and Expenditure records</li> </ul>	Follow as for minor and major financial records.	Follow as for financial records.	<b>Dispose (minor financial records)</b>  7 years after end of celebration.  <b>Permanent (major financial records)</b>  Archive 2 years after celebration.

## 8.00 Newsletters/Orders of Service/Weekly Bulletins/Annual Reports

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Newsletters</b>	These tell us much about parish life and activities and often are the only place to see what takes place outside the formal parish activity.	<p><b>Paper-based:</b> Sort into date order; tie into small bundles with cotton tape and store in a file or box.</p> <p><b>Electronic:</b> Create and store all computer-generated newsletters on a computer in a folder labelled "Parish newsletters". Give each newsletter a unique file name which includes the date eg. "St Andrews_newsletter_June 2014".</p>	<p><b>Permanent</b></p> <p><i>Depositing with PRC Archive?</i> - Send copies to the Archive annually.</p> <p>Electronic newsletter can be emailed to <a href="mailto:pcanzarchives@prcknox.org.nz">pcanzarchives@prcknox.org.nz</a> or can be burnt to a disc (CD/DVD) and posted to the Archive.</p>
<b>Orders of Worship</b>	Documents the parish spiritual life and the various approaches and practices to worship. Also highlights the special services that take place.	As above	<p><b>Permanent</b></p> <p><i>Depositing with PRC Archive?</i> - Send copies to the Archive annually.</p> <p>Electronic orders of worship can be emailed to <a href="mailto:pcanzarchives@prcknox.org.nz">pcanzarchives@prcknox.org.nz</a> or can be burnt to a disc (CD/DVD) and posted to the Archive.</p>
<b>Weekly Bulletins</b>	<p>Bulletins may act as the parish newsletter but generally tell of weekly notices, baptisms, deaths and may be used for service participation.</p> <p>Retain a set for parish use.</p>	As above	<p><b>Permanent</b></p> <p><i>Depositing with PRC Archive?</i> - Send copies to the Archive annually.</p> <p>Electronic weekly bulletins can be emailed to <a href="mailto:pcanzarchives@prcknox.org.nz">pcanzarchives@prcknox.org.nz</a> or can be burnt to a disc (CD or DVD) and posted to the Archive.</p>

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Annual Reports</b>  of the parish, presbytery or organisation (such as women's groups)	Gives overview of parish life for the year and includes the financial annual statement.  Retain a copy for parish use.	As above	<b>Permanent</b>  <i>Depositing with PRC Archive?</i> - Send two copies to Archives annually.  Electronic annual reports can be emailed to <a href="mailto:pcanzarchives@prcknox.org.nz">pcanzarchives@prcknox.org.nz</a> or can be burnt to a disc (CD/DVD) and posted to the Archive.



## 9.0 Property Records and Plans

Each parish/presbytery is required to create and maintain records relating to the administration of church property within their boundary (Book of Order 2012 sec. 16.3).

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Property Transactions:</b>  Includes anything relating to church buildings, the manse, insurance, purchase of an organ, motor vehicle, etc.	Retain all correspondence and applications in obtaining approval for property transactions.  <u>Note:</u> It is important to retain all correspondence and agreements relating to forming co-operation or union as these documents become essential in any dissolution of the union arrangement.	<b>Paper-based:</b> Treat all property transactions as subject files and label clearly with the subject and date. File together in folders, filing boxes or envelopes.  Do <u>not</u> store amongst general correspondence.  <b>Electronic:</b> Create and store all computer generated and received documentation (including emails) on a computer in a folder labelled with the subject and years e.g. "St Andrews Manse 2010-2013".	<b>Permanent</b>  Archive 5 years after the closure of the file.  <i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i>
<b>Plans, Blue Prints, Specifications &amp; Agreements</b>	Plans are often called upon when repairs or extensions are to be undertaken and for structural assessments of the building.  Ensure that all plans are dated (if no date is included on the plan, write the date in soft pencil on the reverse).	<b>Paper-based:</b> Flat plans should be stored in a folder and rolled plans should be stored in a cardboard tube (do <u>not</u> attempt to flatten rolled plans!).  <b>Electronic:</b> Create a folder on the computer labelled with the subject/date and file all property documents into this folder.	<b>Permanent</b>  Archive once building/renovation is completed.  <i>Depositing electronic copies with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive.</i>

## 10.00 Photographs: of parish/presbytery/group related events/buildings/people

A visual history of the parish and the activities undertaken is a wonderful dimension to the written history and heritage story.

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Photographs</b> <ul style="list-style-type: none"><li>• Prints</li><li>• Negatives</li><li>• Slides</li></ul>	<p>The clerk/secretary should regularly request congregational members to provide copies of any photographs pertaining to the parish/presbytery, whether in print, negative or in digital form.</p> <p>Name and date all photographs. For prints, write details on the reverse using a soft pencil.</p> <p>See guide to the “Care of photographs” on PCANZ (Archives) website: <a href="http://www.archives.presbyterian.org.nz/">http://www.archives.presbyterian.org.nz/</a></p>	<p><b>Physical photographs:</b></p> <p>Should be filed separately from paper documents.</p> <p>Negatives are best stored separately from the prints (ensure that the envelope containing negatives is labelled to link with any prints of these).</p> <p>Do <u>not</u> store in sticky albums as the photographs become damaged with the adhesive.</p> <p>Do <u>not</u> adhere photographs into albums using Sellotape or glue.</p> <p>Do <u>not</u> leave around in damp or humid locations which fluctuate in temperature as the photos will deteriorate.</p> <p>Photographs are best stored in acid free paper albums using photo corners, or acid-free paper or inert plastic enclosures (polypropylene, mylar, polyester) which are then placed into a box/file.</p>	<p><b>Permanent.</b></p> <p>Archive as soon as possible after the occasion.</p>

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Photographs</b></p> <ul style="list-style-type: none"> <li>Digital</li> </ul>		<p><b>Digital photographs:</b> Should be saved in <u>one place</u> on a computer (of the parish secretary/clerk) and <u>not</u> dispersed amongst congregation members.</p> <p>They should be regularly backed up onto CD/DVD or an external hard drive.</p> <p>The photos should be placed in folders on the computer which identify the event/place/subject and ideally also given a clear and identifiable file name ie. <u>not</u> just IMG351467!</p> <p>It is also a good idea to print out or create photo books of important events and people.</p>	<p><b>Permanent.</b></p> <p>Archive as soon as possible after occasion.</p> <p><i>Depositing digital photographs with the PRC Archive? – Burn these onto a disc (CD/DVD) and send to the Archive. The higher the quality and resolution the better. Accepted formats: tiff, jpeg.</i></p>

## 11.0 Ephemera: Printed material that is produced for various programmes and activities

Record Type	Notes/Instructions	File/Storage	Final Disposition
<b>Ephemera</b>  Can include: <ul style="list-style-type: none"><li>• Baptismal and membership cards</li><li>• Attendance records</li><li>• Awards</li><li>• Concert tickets</li><li>• Programmes</li><li>• Communion tokens</li></ul>	Keep at least two of each item.  If you have a collection of communion tokens retain them all. They are in fact quite valuable as a collector's item.	Store in filing boxes/folder and label and date.	<b>Permanent</b>  Archive once they are no longer required.

## 12.00 Publications and Resources

This includes material produced by the parish/presbytery to assist its programmes, promote its activity, document the life of the parish, as well as general Presbyterian publications and resource materials used for education.

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Publications/resources</b></p> <p>Can include:</p> <ul style="list-style-type: none"> <li>• Parish Histories</li> <li>• Pulpit Bible</li> <li>• Music</li> <li>• Promotional material</li> <li>• General Assembly Proceedings</li> <li>• General Assembly Year Books</li> <li>• Church Publications</li> </ul>	<p>Publications/resources held by a parish/presbytery can generally be divided into two groups:</p> <p><b>Group 1:</b> Frequently used during activities or produced by the parish/presbytery. This can include:</p> <ul style="list-style-type: none"> <li>• Pulpit bible</li> <li>• Music</li> <li>• Parish histories</li> <li>• Annual Reports of parish</li> <li>• Promotional material produced by parish.</li> <li>• Educational resources produced by the parish.</li> </ul> <p><b>Group 2:</b> Received by the parish/presbytery but not used during activities. This can include:</p> <ul style="list-style-type: none"> <li>• Promotional material sent from PCANZ (Wellington)</li> <li>• General Assembly Proceedings</li> <li>• PCANZ Yearbooks</li> </ul>	<p><b>Paper-based:</b></p> <p>Store onsite at the church.</p> <p>Bound volumes to be stored upright or flat if damaged.</p> <p>Loose items can be stored in filing boxes, folders or large envelopes. Clearly label the folder/file with any dates/subjects.</p> <p>Do <u>not</u> use staples, use paper clips instead.</p> <p>Music can be stored in title order and filed in storage boxes.</p> <p>Resource materials can be filed by subject and kept in an accessible location. These materials seldom have long-term value.</p> <p><b>Electronic:</b></p> <p>Create and retain computer generated documents/resources in a folder on a computer labelled with subject eg. "St Andrews Sunday School".</p>	<p><b>Permanent (Group 1)</b></p> <p>Archive once no longer in active use.</p> <p><i>Depositing at the PRC Archive?</i> – Due to limited space we may not be able to retain all pulpit bibles, music or more generic publications/resources. We will return these to you, or dispose of them for you, as requested.</p> <p><b>Dispose (Group 2)</b></p> <p>Dispose once no longer referred to.</p>

## 13.00 Recordings: including Videos/Sound Recordings/DVD/CD

These are significant resources that give a visual and sound history of the parish.

Record Type	Notes/Instructions	File/Storage	Final Disposition
<p><b>Recordings</b></p> <p>Can come in a variety of formats:</p> <ul style="list-style-type: none"> <li>Audio-visual (Video tapes, DVD's, reel films, digital films).</li> <li>Audio (CD's, cassette tapes, reel tapes, vinyl records, digital recordings).</li> </ul>	<p>Recordings held by a parish/presbytery can generally be divided into two groups:</p> <p><b>Group 1:</b> Produced by the parish/presbytery to document events or to use as part of its mission.</p> <p><b>Group 2:</b> Used by the parish/presbytery as part of its mission but not produced by them or the Presbyterian Church of New Zealand.</p>	<p><b>Physical recordings:</b> Such as tapes, video's, DVD's.</p> <p>These should be stored in a cool, dark and dry environment.</p> <p>They should be stored in a box or cupboard to protect from dust and fluctuating environmental conditions.</p> <p>If you can, convert any old formats to newer formats. Especially for Group 1 items. There are a number of providers which offer this service throughout New Zealand.</p> <p><b>Digital recordings:</b> Every five years, or when you update the movie/audio software on your computer, check that the recordings can still be played. Migrate to a newer version of programme or a different programme if necessary.</p> <p>Produce back-up copies of any recordings onto CD/DVD, external hard drive or cloud storage on a regular basis (such as annually).</p>	<p><b>Permanent (Group 1)</b></p> <p>Archive 1 year after the event.</p> <p><u>Note:</u> if you hold any 35mm film contact the Archivist (<a href="mailto:pcanzarchives@prcknox.org.nz">pcanzarchives@prcknox.org.nz</a>) as these recordings can be deposited with the New Zealand Film Archive (Wellington) on long-term loan.</p> <p><b>Dispose (Group 2)</b></p> <p>Dispose of recording 5 years after last use.</p> <p><u>Note:</u> if you are ever in doubt about what recordings to dispose of, please contact the PRC Archive.</p>

## Further Information and Resources

### Caring for your Collections

**The National Preservation Office (Alexander Turnbull Library)** has some excellent and up-to-date advice regarding caring for a variety of collection types such as paper, photographs (print and digital), recordings: <https://natlib.govt.nz/collections/caring-for-your-collections>

**New Zealand Conservators of Cultural Materials (NZCCM)** can provide specialist advice and treatment for your collections: <http://www.nzccm.org.nz/>

### Recordkeeping Advice

Do you need further information about how to set up and maintain your recordkeeping programme for both paper and electronic records? Then please refer to the Parish Handbook available via the Presbyterian Research Centre (Archives) website (<http://www.archives.presbyterian.org.nz/>) under 'Parish Resources'.

Please contact the Archivist ([pcanzarchives@prcknox.org.nz](mailto:pcanzarchives@prcknox.org.nz)) if you would like specific and tailored advice on how to manage your paper and electronic records.