

# THE FRIENDS OF SOUTH AUSTRALIA'S ARCHIVES INC.

## GUIDELINES FOR ARCHIVING OF RECORDS BY RELIGIOUS BODIES & ORGANISATIONS

### INTRODUCTION

This document has been prepared to assist religious bodies with their record keeping. It has been expressed in generic language and needs to be adapted to the particular organisational structure and terminology of the body using it.

### 1. WHY KEEP RECORDS?

Documents recording information about a religious body or congregation are valuable for many reasons, including:

- (i) satisfying administrative and accountability requirements: for example, property, finance
- (ii) documenting its history: for example, worship, congregational life, buildings.

Documents of the types listed in the next section are the institutional memory of the congregation. They enable people to understand where they have come from. This assists in planning for both the present and the future and provides a solid foundation for thanksgiving and commemoration. Some records such as church council minutes serve both purposes. Other records, such as orders of service for special occasions, may serve only the second purpose.

### 2. SCOPE OF RECORDS – What should be kept?

What should be kept includes but is not limited to:

- Minutes and significant correspondence of management committees and of any sub-committees ('significant correspondence' is explained further in Section 3)
- Minutes of meetings of congregation members
- Registers: Baptismal, Marriage, Funeral & Cemetery
- Membership Lists
- Reports presented at annual general meetings, whether single copy or printed as a *Book of Reports* issued to members
- Newsletters and magazines
- Orders of Service for special occasions
- Legal documents such as constitutions, property titles, insurance documents
- Records of all places of worship owned and used, for example, homes, schools, halls
- Building and grounds plans, including cemeteries and memorial gardens, together with details and plans of demolished buildings and alterations or additions to existing buildings
- Records about church furnishings such as organs, decorative windows, statues, church vessels, memorial plaques, banners and other types of regalia. Full details of creators, donors and purpose should also be kept
- Financial records:
  - end-of-year financial statements
  - invoices, specifications, quotations for major or significant expenses such as a new organ or memorial windows
- Photographs, audio-visuals, brochures, publications
- Records of organisations within the congregation such as Fellowships and Sunday Schools:
  - minutes,
  - significant correspondence,
  - annual reports,
  - annual financial statements and significant invoices
  - newsletters, photographs, memorabilia

- Circulars and other explanatory material re changes to worship or other congregational activity, building additions or alterations, etc
- Rosters of service times and places
- Any other items of historic interest.

### **3. MANAGEMENT, SENTENCING AND CULLING OF RECORDS**

#### **(i) Minute Books**

All minute books are to be retained as permanent records. Correspondence and reports on which significant decisions are based and/or which are essential for a complete understanding of decisions reached must be retained with the minutes.

#### **(ii) Correspondence - Inwards & Outwards**

All correspondence created and received should be managed, culled and archived in accordance with the following principles:

1. Correspondence relating to matters still current should be retained for administrative purposes. After it ceases to be current it should be retained for a period of seven (7) years.
2. After the 7 year period has expired, the correspondence should be reviewed for its significance in documenting the life of the organisation, and
  - (a) if it is significant it should be retained permanently
  - (b) if it is not significant it can be destroyed.
3. Routine and irrelevant correspondence, such as charity appeal letters and advertising material, can be destroyed immediately.

These principles apply to the correspondence created and received by clergy, office bearers and groups within the congregation and organisation.

#### **(iii) Financial Records**

1. End of year financial statements are to be retained permanently.
2. Invoices, bank statements, cheque butts, collection books, cash books, etc are to be retained for seven years.
3. After completion of the statutory retention period:
  - (a) invoices, specifications, quotations, etc, for major or significant purchases are to be extracted and retained permanently,
  - (b) the remaining records may be retained or destroyed at the discretion of church council.

#### **(iv) Other Records**

All other items listed in Section 2 (Scope of Records) are to be retained permanently.

### **4. ELECTRONIC RECORDS**

Electronic records present numerous issues which need to be addressed. There is no foolproof method of keeping electronic material safe and accessible for an extended period, not least because of the rapidly changing software and hardware needed to access material. Therefore printed copies should be made of all permanent records and all those records likely to become permanent.

### **5. CARE & STORAGE OF RECORDS (On-Site)**

1. Records retained on church premises should be kept in secure storage, taking particular consideration of
  - fire protection
  - climate control
  - insect protection.

2. Parish registers, minute books and other official records should be kept secured in a lockable cabinet.
3. All additional items in the collection should be stored off the floor at all times and kept in boxes, folders and wrapping papers (acid free if possible). The ideal location would be in a special storage area such as a lockable filing cabinet.
4. Avoid the use of adhesive tapes, rubber bands, pins, metal paper clips and staples where possible. These materials rust or stain documents and should be avoided wherever practicable.

## **6. CARE & STORAGE OF PERMANENT RECORDS**

1. Permanent records can be stored in:
  - the central church archives, where one exists
  - The State Library of SA
  - onsite in church premises.

Some denominational state bodies have archival storage of their own, others recommend that congregations deposit in the State Library.

2. It is strongly recommended that records are not given to local historical societies or kept on private premises.
3. Records given permanent record status should be deposited into archival standard storage when no longer required for day-to-day operations of the congregation. An archival-standard repository for storage of permanent records:
  - is constructed solely of masonry and steel (i.e. no timber or glass)
  - has air-conditioning and humidity control
  - is fitted with a sprinkler system
  - is fitted with heat and smoke detectors.
4. The State Library of South Australia offers archival-standard storage for permanent records of South Australian organisations. There are two types of agreements:
  - *Deed of Deposit*
  - *Deed of Gift*

Under the terms of the *Deed of Deposit* the Library assumes custody only (not ownership) of the records and permits the congregation to temporarily borrow items. It also allows the congregation to impose access restrictions. Under the terms of the *Deed of Gift* the Library assumes full ownership and control of the records, including the right to destroy them.

It is strongly recommended that the *Deed of Deposit* be used.

## **7. ACCESS**

1. The records may be used by people researching:
  - personal information
  - the individual congregation
  - the denomination as a whole
  - religion generally
  - society generally.

Each congregation needs to determine what, if any, restrictions it places on access to its records.

2. It is recommended that an access policy is established. The policy should:
- identify confidential records such as personal details in registers and administrative records and decide on the restricted time period for these records.
  - state the access conditions and procedures to be followed by researchers. These should include:
    - certified identification of those researchers requesting confidential information such as a baptism or marriage record, whether in person or by mail, email or telephone;
    - details of any charges for the research service.
  - provide for supervision of researchers and records
  - include a register for all research enquiries
  - state the person or persons, such as the minister or chairman of council, authorised to approve access to records.

3. Records Stored at the State Library:

As a general rule the State Library will make the records available to any researcher who requests access, unless otherwise instructed. Any access restrictions determined by a congregation are listed in a schedule to the *Deed of Deposit*. This schedule also lists who can authorise access to restricted records (e.g. minister or chairman of the church council). Where there are access restrictions, the State Library will only make the records available after the researcher has presented a letter of permission from the designated representative of the congregation.

-----

The membership of The Friends of South Australia's Archives Inc. includes both archivists (the custodians of records) and historians and other users of historic documents. It was formed in February 1996 with the following aims

1. to encourage the preservation of historical records,
2. to assist the keepers of public and private archives in South Australia, and
3. to represent the concerns of users of the archives.

The committee of The Friends of South Australia's Archives appointed a working party on congregation and church records in May 2007. The members of the working party are Mr Alan Jones (an historian), Mr Lyall Kupke (Archivist, Lutheran Church of Australia), Mr David Whyatt (Archivist, Churches of Christ, South Australia), Mrs Robin Radford (Archivist, Anglican Diocese of Adelaide), and Ms Suzanne Ryan (Archivist, Adelaide Catholic Archdiocese).

Electronic copies of the pro-forma policy and document may be obtained from Mr Lyall Kupke at Lutheran Archives, telephone 8340 4009 (during office hours), email: [lyall.kupke@lca.org.au](mailto:lyall.kupke@lca.org.au). Enquiries about the document may be directed to Mr Kupke (as above) or to Mr Alan Jones, telephone 8272 7519 (home).

As far as we are able, the Friends will assist in introducing recordkeeping and archiving policies and procedures at either individual congregational or denominational level.