

**THE ANGLICAN DIOCESE OF GRAFTON
DIOCESAN POLICIES AND PROCEDURES**

SUBJECT: RETENTION OF RECORDS		PROCEDURE REFERENCE NUMBER REG-003
DATE APPROVED 14 September 2017 by Bishop-in-Council		REVISION NUMBER Original
POLICY IMPLEMENTATION DATE 1 October 2017	REVIEW DATE AND FREQUENCY 3 Yearly	RESPONSIBLE FOR REVIEW Bishop-in-Council

1.0 PURPOSE

The Church has many reasons for managing its records:

- as a testimony of its continuing witness to Christ;
- as good stewardship of a valuable asset and resource;
- to demonstrate compliance with regulations and legal requirements; and
- to preserve corporate memory.

This procedure sets the standard on the types of documents that are to be retained, the location of their storage and the periods of storage.

The basis for this procedure is to retain documents as required for:

- legal and regulatory requirements;
- proper management of church property and trusts;
- records of key events for individuals in the life of the church (e.g. baptism, confirmation, ordination); and
- ensuring compliance with church protocols and procedures.

2.0 SCOPE

This procedure covers the records of the Anglican Diocese of Grafton's Synod, Bishop, Registrar, Bishop's Registry, Bishop-in-Council, The Corporate Trustees and their various committees (both standing and temporary committees), Anglican Funds Grafton Diocese, Clergy, Parishes and parish ministries and activities.

This procedure does not include the records for the organisations listed in Schedule A that are expected to maintain and retain appropriate records with compliance with governing legislation as a minimum accepted standard. The exemption from this Procedure does not infer an exemption from the requirement to provide the Bishop or Registrar with records on demand. Additionally, in the event of being wound up or taken over, the board, council or managing committee, of the listed organisation shall offer all records to the Registrar for diocesan storage and the Registrar will determine the disposition of the records to best meet the obligations of the organisation and the diocese.

3.0 DEFINITIONS

3.1 Record

A document, book, register, paper, photograph, map, sound or video recording, file, email or any other material, regardless of physical form or characteristics, created, received, or produced in the conduct of the organisation, including the activity of officers and employees of the organisation, and that comprises content, context and structure sufficient to provide evidence of the activity.

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3.2 Correspondence

A message received on paper or electronically by email sent for a particular purpose.

4.0 POLICY

4.1 Legislation

If there is any conflict between the requirements of this procedure and applicable legislation, the legislation will prevail.

4.2 Parish Records

Parishes shall maintain a records management system that allows for retention of material that is relevant to the ministry of the parish and conforms to the following.

Where there is a requirement for the Parish to send records to the Diocesan Archive or other location external to the Parish, the Parish may choose to photocopy or scan any records that they wish to retain for easy reference within the Parish.

4.2.1 Parish Non-Financial Records

Content	Instructions	Final Disposition
Service Register Baptism Register Marriage Register Confirmation Register Burial Register	Retain Registers that are in use and not greater than 10 years of age. Completed Registers, Registers for worship centres that are no longer in use, or Registers over 10 years of age shall be sent to the Diocesan Archive.	Permanent storage in Diocesan Archive
Rosters and Intercession Lists	Retain current and one previous list.	Destroy
Special Orders of Service (e.g. a dedication)	Retain one copy within parish for 5 years before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Pew Sheets	Retain one copy within parish for 5 years.	Destroy
Parish Magazines	Retain one copy within parish for 5 years.	Destroy
Parish scrapbooks, newspaper clippings,	Retain one copy within parish. Storage duration at parish	At discretion of the Parish.

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Content	Instructions	Final Disposition
photographs and similar	discretion.	
Parish Diaries	Retain one copy within parish for 5 years.	Destroy
Parish Roll	Retain current. One copy of each previous Parish Roll to be sent to Diocesan Archive.	Storage in Diocesan Archive for 30 years
Visitor Books	Retain at parish. Storage duration at parish discretion.	At discretion of the Parish.
Risk Assessment	Retain current and previous only. Where an incident occurs add copy of the then current risk assessment with the incident report.	Destroy
Accident/Incident Reports	Retain at parish for 5 years from date of incident. Where incident resulted in an injury (physical, emotional, psychological) the report is to be sent to Diocesan Archive. All non-injury reports may be disposed of after 5 years.	Reports involving injury to be stored in Diocesan Archive for 30 years.
Correspondence – with reference to complaints or reports on incidents	Retain within parish for 5 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years.
Correspondence – heritage issues	Retain within parish for 7 years before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Correspondence – memorial gifts, special gifts and dedications	Retain within parish for 7 years before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Correspondence – general business and ministry correspondence	Retain within parish for 7 years.	Destroy
Correspondence – Cemetery or Memorial Garden reservations	Retain within parish.	Permanent storage
Correspondence – advertising and marketing	Retain in parish only as required for consideration of offer.	Destroy

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Content	Instructions	Final Disposition
Greeting cards	Retain in parish only as required	Destroy
Circulars, Newsletters, Newspapers and Magazines sent by other organisations	Retain in parish only as required	Destroy
Faculties and Licences	Parish to retain its copy. Registry copy to be retained and stored in Diocesan Archive.	Permanent storage
Notices of Clearance (Safe Ministry, Working with Children, Police checks as applicable)	Retain within parish for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years
Volunteer documentation (Not prescribed elsewhere)	Retain within parish for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years after completion of service
Documentation relating to non-volunteer Appointments	Retain within parish for 7 years after cessation of appointment before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years after completion of service
Applications for positions	Successful applications to be retained with records of appointments. Unsuccessful applications to be retained for 6 months (or longer if the appointment is challenged).	Unsuccessful applications to be destroyed at end of retention period
Minutes of Parish Council	Retain within parish for 10 years with the agenda and papers provided to members for the purpose of the meeting before sending to Diocesan Archives.	Storage in Diocesan Archive for 30 years
Annual General Meeting Minutes	Retain within parish for 10 years with the agenda and papers provided to members for the purpose of the meeting, before sending to Diocesan Archive.	Permanent storage in Diocesan Archive.
Special General Meetings of Parish	Retain within parish for 10 years with the agenda and papers provided to members for the	Permanent storage in Diocesan

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Content	Instructions	Final Disposition
	purpose of the meeting, before sending to Diocesan Archive.	Archive
Voting Slips	In circumstances where there is no challenge to the result of a ballot, voting slips shall be retained for 30 days following the ballot. Where the result of a ballot is challenged, voting slips shall be retained for 30 days following resolution of the challenge.	Destroy after completion of retention period
Staff Meeting Minutes	Retain within parish for 3 years.	Destroy after completion of retention period
Parish Profiles (created during vacancy)	Retain within parish for 3 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years.
Parish Histories	Minimum of one copy to be retained in the parish and one copy to be sent to Diocesan Archive.	Permanent storage
Inventory Record	Retain two copies of the current and the immediately previous list. One copy shall be in the normal parish records and the other at another reasonably secure location.	Destroy after completion of retention period
Warranty information and operation manuals for equipment.	Retain within parish for life or ownership of equipment.	Destroy after completion of retention period.
Specifications, plans, drawings and warranty information for buildings, building extensions and incorporated equipment	Retain within parish for the warranty period. , before sending the principal drawings to the Diocesan Archive. Detail drawings may be destroyed after the warranty period.	Permanent storage
Rental agreements for hire of halls, rental of houses and similar	Retain current agreement and any superseded agreement for 7 years in parish records.	Destroy after completion of retention period
Rectory inspections	Retain current inspection record and records of any previous inspections for 7 years in parish records.	Destroy after completion of retention

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Content	Instructions	Final Disposition
		period
Quotes and Contracts for work	Retain in parish for 7 years after completion of work.	Destroy after completion of retention period
Quotes and tenders	Retain unsuccessful quotes and tenders until 6 months has elapsed since awarding of the work (or decision not to proceed).	Destroy after completion of retention period
Copyright details	Retain in parish for 7 years after end date of copyright license.	Destroy after completion of retention period

4.2.2 Parish Financial Records

Content	Instructions	Final Disposition
Annual Audited Financial Statements	Retain one copy within parish for 7 years. Send one copy to Diocesan Archive.	Permanent storage in Diocesan Archive
Audit correspondence	Retain within parish for 7 years.	Destroy after completion of retention period
Cash Books	Retain within parish for 7 years.	Destroy after completion of retention period
Invoices and Receipts	Retain within parish for 7 years.	Destroy after completion of retention period
Bank Statements	Retain within parish for 7 years.	Destroy after completion of retention period
Other financial records	Retain within parish for 7 years.	Destroy after completion of retention period
Stewardship – Planned Giving Program pledges	Retain within parish for 1 year	Destroy after completion of retention period
Employment timesheets	Retain within parish for 2 years.	Destroy after completion of retention period
Other employment records	Retain within parish for 1 year past duration of employment and then	Storage in Diocesan Archive

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Content	Instructions	Final Disposition
	send to Diocesan Archive	for 30 years past duration of employment.

4.2.3 Records of Other Parish Organisations

Where parishes have an associated organisation (not a subcommittee) under the parish Australian Business Number (ABN) and which has its own governance structure and recordkeeping, the following principles shall apply.

Content	Instructions	Final Disposition
Financial Statements	Retain at least one copy within parish for at least 7 years.	Destroy after completion of retention period
Minutes	Retain within parish for 10 years with the agenda and papers provided to members for the purpose of the meeting.	Destroy after completion of retention period
Annual Report	Retain one copy within parish for 7 years. Send one copy to Diocesan Archive.	Permanent storage in Diocesan Archive
Membership Lists	Retain current and one superseded list.	Destroy after completion of retention period
Bank Statements	Retain within parish for 7 years.	Destroy after completion of retention period
Correspondence	Retain within parish for 7 years.	Destroy after completion of retention period

Where the organisation has a unique ABN, the standards listed in 4.2.1 and 4.2.2 shall be followed.

4.3 Clergy Records

Clergy shall maintain a personal records management system that allows for retention of material that is relevant to their ministry (e.g. copies of articles written, correspondence) The distinction between what is personal and professional and those that belong to the parish need to be explored at all times, if there is a doubt ensure that two copies are kept – one parish, one personal.

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Content	Instructions	Final Disposition
Diaries	Current plus 7 years.	Destroy after completion of retention period
Other Pastoral Notes or Records	Dispose of once the matter is resolved or upon vacating the parish.	Destroy after completion of retention period
Correspondence	Please be clear whether the matter is of a professional nature or a matter of office or cure. Professional issues are considered private and personal and clergy will need to maintain their own system. Matter of office or cure would need to be filed in the parish file system as indicated.	Review/Sample
Ministry Related Expenses (MRE) Financial Data or any other salary sacrifice program	Current plus 6 years.	Destroy after completion of retention period
Speeches and Sermons	Retain for 6 months. Where controversy arises retain for period as advised by Bishop.	Destroy after retention period

4.4 Diocesan Records

4.4.1 Diocesan Non-Financial Records

Content	Instructions	Final Disposition
Minutes of: <ul style="list-style-type: none"> • Synod, • Bishop-in-Council, • Corporate Trustees 	Retain within Bishop's Registry for 7 years with the agenda and papers provided to members for the purpose of the meeting, before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Minutes of: <ul style="list-style-type: none"> • Anglican Funds Grafton Diocese Board, • Audit Committee, • Buildings and Property Committee • Diocesan Schools Commission 	Retain within Bishop's Registry for 7 years with the agenda and papers provided to members for the purpose of the meeting, before sending to Diocesan Archive.	Storage in Diocesan Archives for 15 years.

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Content	Instructions	Final Disposition
<ul style="list-style-type: none"> • Similar bodies 		
Reports of special committees and working groups	To be included in meeting papers of a major governance body	Not applicable
Ordinances	Retain current version in Registry. Copy of each sent to Diocesan Archive.	Permanent storage in Diocesan Archive
Ordinance Register	Retain in Registry.	Permanent storage
Policies, procedures and regulations	Retain current version in Registry. Copy of each sent to Diocesan Archive.	Storage in Diocesan Archives for 50 years.
Seal Register	Retain Register in use in Registry. Completed Registers sent to the Diocesan Archive.	Permanent storage in Diocesan Archive
Trust Deeds	Retain current version in Registry. Copy of each sent to Diocesan Archive.	Permanent storage in Diocesan Archive
Conferences	Conference program and presentation transcripts (where available) to be retained for 10 years.	Destroy
Declarations of Conflict of Interest and or Fit and Proper Person	Retain within Bishop's Registry for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archives for 15 years.
Nominations for offices	Nomination forms for an office or position on a Diocesan body to be retained for 3 years.	Destroy
Voting slips	In circumstances where there is no challenge to the result of a ballot, voting slips shall be retained for 30 days following the ballot. Where the result of a ballot is challenged, voting slips shall be retained for 30 days following resolution of the challenge.	Destroy after completion of retention period
Correspondence – with reference to complaints, requests or reports on incidents	Retain within Registry for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years

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Content	Instructions	Final Disposition
Correspondence – with reference to appointments	Retain within Registry for 7 years before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Correspondence – compliance issues	Retain within Registry for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years
Correspondence – memorial gifts, special gifts and dedications	Retain within Registry for 7 years before sending to Diocesan Archive.	Permanent storage in Diocesan Archive
Correspondence – general	Retain within Registry for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 15 years
Correspondence – advertising and marketing	Retain only as required for consideration of offer.	Destroy after completion of retention period
Greeting cards	Retain in Registry only as required	Destroy
Circulars, Newsletters, Newspapers and Magazines sent by other organisations	Retain in Registry only as required	Destroy
Diocesan publications (e.g. North Coast Anglican, Clergy Update, Registry Update, newsletters)	Retain current and previous copy in Registry. A copy to be placed in Diocesan Archive.	Permanent storage in Diocesan Archive
Licensed Lay Minister nominations	Retain within Registry for 7 years before sending to Diocesan Archive.	Storage in Diocesan Archive for 30 years
Ordination candidate files	Merge file with clergy service file if ordained and hold in Registry while in active service before sending to Diocesan Archive. If not ordained hold in Registry for 5 years before sending to Diocesan Archive.	Storage in Diocesan Archive for life of individual plus 10 years.
Quotes and Contracts for work	Retain for 7 years after completion of work.	Destroy after completion of

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Content	Instructions	Final Disposition
		retention period
Quotes and tenders	Retain unsuccessful quotes and tenders until 6 months has elapsed since awarding of the work (or decision not to proceed).	Destroy after completion of retention period
Real Estate Title Deeds	Retain for duration of ownership. Secure storage at Registry or solicitor.	Not applicable
Other real estate documentation (e.g. maintenance records, depreciation schedules, valuations, water rights, zoning, contract documentation, leases)	Retain for 7 years after completion	Destroy after completion of retention period
Employment timesheets	Retain within Registry for 2 years.	Destroy after completion of retention period
Other employment records	Retain within Registry for 1 year past duration of employment and then send to Diocesan Archive	Storage in Diocesan Archive for 30 years past duration of employment.

4.4.2 Safe Ministry Records

Records included in this section may include National Register Checks, Police Checks, psychological appraisals, Working With Children Checks, training records and certification for Safe Church, Faithfulness in Service and similar, and reference checking of candidates.

Content	Instructions	Final Disposition
Safe Ministry records for Clergy and Stipended Lay Ministers	Retain in Registry for active clergy and ministers before sending to Diocesan Archives.	Retain records in Archives for 30 years beyond completion of service
Safe Ministry records for Lay Employees	Retain in Registry for current employees before sending to Diocesan Archives.	Retain records in Archives for 30 years beyond

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Content	Instructions	Final Disposition
		completion of service
Safe Ministry records for Licensed Lay Ministers	Retain in Registry for active lay ministers before sending to Diocesan Archives.	Retain records in Archives for 30 years beyond completion of service
Safe Ministry records for Children's Ministry	Retain in Registry for those active in children's ministry before sending to Diocesan Archives.	Retain records in Archives for 30 years beyond completion of service
Safe Ministry records for other volunteers	Retain in Registry for active volunteers before sending to Diocesan Archives.	Retain records in Archives for 30 years beyond completion of service

4.4.3 Diocesan Financial Records

Content	Instructions	Final Disposition
Annual Audited Financial Statements	Retain one copy in Registry for 7 years. Send one copy to Diocesan Archive.	Permanent storage in Diocesan Archive
Audit correspondence	Retain in Registry for 7 years	Destroy after completion of retention period
Cash Books	Retain in Registry for 7 years.	Destroy after completion of retention period
Invoices and Receipts	Retain in Registry for 7 years.	Destroy after completion of retention period
Bank and Credit Card Statements	Retain in Registry for 7 years.	Destroy after completion of retention period
Budget	Retain approved budget for 7 years. Retain budget notes for 3 years.	Destroy after completion of retention period
Other financial records	Retain in Registry for 7 years.	Destroy after completion of retention period

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Content	Instructions	Final Disposition
Tax Declarations	Retain in Registry for 7 years.	Destroy after completion of retention period
Bequests	Retain in Registry for 7 years unless the bequest creates a trust whereupon the details of the bequest be stored with the trust documentation.	Destroy after completion of retention period

4.5 Variation in Retention Periods

Where a retention period is prescribed where the documents are to be destroyed at the conclusion of that period, it is permissible for the holder of the documents to retain the documents for longer than the prescribed period.

Where documents are to be forwarded to the Diocesan Archives after a period, it is permissible for the documents to be sent to the Diocesan Archives in advance of the prescribed period if the holder considers it necessary for the security or preservation of the documents.

4.6 Despatch to Diocesan Archives

The efficiency of retrieval of archived documentation is dependent on the way that they are stored and sent to archives. The following guidelines are to ensure that materials are sent to the Diocesan Archives in an appropriate condition and arrangement.

4.6.1 Labelling

All despatches to the Diocesan Archives should be labelled such that each box and container has a clear easily-read label that identifies:

- Source of the documents (e.g. parish)
- Topic or category of the documents (e.g. Incident Reports)
- Date or date range of the documents (e.g. 2010 to 2015)
- Retention expiry date, if applicable (e.g. 2020)

4.6.2 Sorting

As far as practicable, boxes of documents should be sorted into files where the files are labelled and where the combination of documents is logical. Duplicates should be removed where possible.

4.6.3 Condition

Materials sent to the Diocesan Archive shall be packed:

- in sturdy boxes no bigger than 420(l) x 315(w) x 270(h)mm
- weighing no more than 10kg
- vermin-free

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- mould-free
- without wet or damp materials

Where paperclips are used, it is preferable that these are plastic coated.

4.6.4 Digital files

Digital files should be on a stable storage medium that is appropriately labelled as per 4.6.1 and where each file is:

- named in a way that identifies its content and date (e.g. Mullumbimby Parish Council Minutes 25 February 2010)
- in Portable Document Format (pdf)
- virus free.

4.6.5 Excluded Items

The Diocesan Archives is for the storage of documents for the purposes outlined in 1.0 of this procedure. Consistent with this purpose, the Diocesan Archives will not accept:

- Any artefact except photos that relate to a category of documents that are otherwise stored by the Diocesan Archives;
- Documents that are not listed for Diocesan Archive storage in 4.2, 4.3 or 4.4 of this procedure except where permitted by the Bishop or Registrar at the time.

5.0 REFERENCES

Chapter 21 Diocesan Governance Ordinance 2008

ADM-001 Privacy

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SCHEDULE A – DIOCESAN ORGANISATIONS EXEMPT FROM PROCEDURE

Lindisfarne Anglican Grammar School

Emmanuel Anglican College

Clarence Valley Anglican School

Bishop Druitt College

St Columba Anglican School

St Columba Anglican School Foundation

Anglicare North Coast Inc.

St Cuthbert's Retirement Living Complexes

Lismore Parish Pre-School