



CATHOLIC ARCHDIOCESE
OF ADELAIDE

RECORDS RETENTION SCHEDULE

Records Retention Schedule for the Catholic Archdiocese of Adelaide

Introduction

The Records Retention Schedule for the Archdiocese of Adelaide applies to all administrative records created or received by the archdiocese that document the business transactions of the archdiocese. The decisions documented in the Schedule represent the determinations of the Archdiocese and apply to records in all formats, including paper, electronic, audiovisual and microform. Any variations to these determinations will require review and consultation through the Archivist / Records Manager¹

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Terms and Scope Notes taken from *Keyword AAA: A Thesaurus of General Terms, revised edition 1998*, are reproduced under a licence agreement between the Adelaide Archdiocese and the State Records Authority of New South Wales.

Confidentiality

This schedule contains disposal recommendations that refer to confidential matters that are privy only to the Archdiocesan Office. These recommendations relate to records where they contain:

- personal information;
- sensitive information of a personal nature;
- information potentially relating to abuse investigations; and
- culturally sensitive material.

Retention

Retention periods have been determined by the legal, administrative, evidential and financial accountability requirements of the Archdiocese. Records are nominated as having either temporary value or permanent value. **Temporary** value records are those which at some stage will be disposed of. **Permanent** records are those with continuing value and are intended to be retained in perpetuity.

The Schedule is used to sentence records. **Sentencing involves applying the record retention periods documented in the column "Disposal Action" to the records.** Decisions are made using the Schedule about whether records are to be retained and, if so, for how long, or when they are to be destroyed.

Retention periods set down in the Schedule are minimum ones and the Archivist may extend the retention period of the record if there is an administrative need to do so. Where records are retained regularly for substantially longer periods the Schedule should be amended to reflect this requirement.

¹ This authority only applies to records created as a result of one of the 19 administrative functions (Keywords) and not the records relating to business activities carried out by agencies to support their unique functional agency responsibilities

Review and amendment of schedule

Reviews are especially necessary if there is considerable change that affects the currency and use of the records.

The Archivist/Records Manager needs to approve all amendments to the Schedule. Officers using the Schedule should advise the Archivist/Records Manager of any necessary changes.

Entries in the Schedule are numbered. When a new series of records is added, it will be allocated the next number available in that particular Keyword. (Although this means that the current alphabetical ordering may then be lost, a data sort can reproduce this alphabetical listing if required.) The numerical codes are essential and must be noted on the covers of file folders for accuracy and future reference.

Temporary Records Rationale

Temporary records are those considered not to have continuing value to the Archdiocese, or its community. Records in this Schedule that are considered of temporary value have short terms before expiry. These include:

- participation by invitation or choice on committees where involvement is not significant, and/or routine meetings and arrangements.
- routine relationships with other religious and non-religious organisations
- records of informal meetings of staff to discuss and communicate administrative issues that do not bear upon the development of policy or strategy, nor on the core business
- records of operating procedures and instructions to implement policy.

Permanent Records Rationale

The records nominated for permanent retention in this schedule document the high level support and core business transactions of the Archdiocese of Adelaide and include those records mandated by legal, administrative, evidential and financial accountability requirements of the Archdiocese. Other records nominated for permanent retention include those that provide evidence of:

- the appointment and/or employment of clergy and members of religious orders.
- proceedings of Councils and Committees initiated by the Archdiocese and includes terms of reference, constitution, minutes and agendas
- records of meetings with Heads of Churches
- records of pastoral services
- records relating to the Archbishop

In addition **all welfare records**, including those covered by Recommendation 21 of the “Bringing Them Home” report should be retained permanently. Recommendation 21 states:

“that no records relating to indigenous individuals, families or communities or to any children, indigenous or otherwise, removed from their families for any reason, whether held by government or non-government agencies, be destroyed”

Layout

The Retention Schedule is a series of columns which lists the record series for the Archdiocese by the business activity which they document. The Schedule is designed to be compatible with the layout of the Archdiocesan Thesaurus, and to reflect the column headings for future integration.

Keyword – each Keyword represents a major business function of the Archdiocese. Each of these includes scope notes to provide clarity about the meaning of the term in the specific context of the Archdiocesan Office.

Activity – each Activity represents a business activity which comprise a business function or keyword. Activities can be relevant to more than one Keyword, but the meaning does not change. Each of the Activities has scope notes to provide clarity about the meaning of the term in the specific context of the Archdiocesan Office.

Record Series – For each Activity, there might be one or several series of records. Each series of records is separately described, as they may have different retention periods.

Record examples – Examples of records specific to the series mentioned. Record examples provide some further clarity to understanding the series.

Disposal action – Records will be retained permanently or temporarily. Temporary retention can nonetheless be a very long time. Disposal decisions, if temporary, are documented by stating how long the records must be kept beyond their last action “Last action” usually constitutes a transaction of some type – a letter, a file note or some research.

Source – Sometimes, disposal actions are based upon how other organisations regard the record. Where the decision reflects a conventional regard for the record, that source is cited. Most of these will be government decisions – federal, state and local – whose decisions are well documented in their General Disposal Schedules, hence the quoting of “GDS” numbers.

How to use the Records Retention Schedule

1. Extracting files for transfer and/or destruction

Files which are time-expired, and eligible for destruction according to the Schedule, can be extracted on a regular basis, but must not be destroyed until approved by the Archivist.

The Archivist must also be contacted prior to any transfer of records so that suitable arrangements can be made. **Records will not be accepted by the Archives without prior consultation.**

All records to be destroyed must be listed for recordkeeping audit reasons.

2. Boxing files

Permanent files to be transferred and retained in the Archive must be kept in their original order – that is, the order in which they were originally created and used for business. Files that have been maintained in alphabetical order will be boxed in that same order.

Records for temporary retention should be boxed and stored in the years of their future destruction so that whole boxes are destroyed at the end of the calendar year of their retention.

3. Boxing checklist

- Step 1: Obtain Type 1 archival boxes
- Step 2: Identify record series to be prepared and transferred to Archives, or put aside for destruction
- Step 3: Work through the files, identifying series with the appropriate entries in the Retention Schedule. For temporary records, calculate the year of destruction and notate that, plus the rule number, on the cover of each e.g. "D2006, 12.1.2" For permanent records, notate "P" and the rule number on the cover.²
- Step 4: Place series in boxes in correct sequence. Permanent records will be maintained in their original order. Temporary records will be boxed in number order, in boxes specific to their year of destruction.
- Step 5: Number every box. This is critical for retrieving files in the future.
- Step 6: List the records in box order on a Destruction List (if temporary records) or an Archive List (if permanent).

² It is possible that two or more 'activities' are documented on the one file. In this case you must allocate the longest minimum retention period. For example, if you are sentencing a file that contains both **original minutes from a committee meeting** (disposal action = "archive"), but also contains **duplicate copies of minutes from external committees** (disposal action = "destroy 2 years after last action"), you must sentence the file for permanent retention and eventual transfer to Archives.

4. Destroying records

When boxes of records are due for destruction and approval has been given by the Archivist, arrangements must be made with a recommended firm to carry out the destruction. The firm will provide a "certificate of destruction" - your evidence that the records have been confidentially destroyed and cannot be reconstructed. (Note: You *must* keep a record of the files that you destroy and the authority under which the record was destroyed.)

Records that are overdue for destruction must be destroyed in such a way as to ensure that no information is retrievable. Hard copy (paper) records overdue for destruction may only be destroyed by shredding, pulping or placed in a confidential bin.

Electronic records that are overdue for destruction may be destroyed by reformatting, rewriting or degaussing of the hard drive, or by the use of shredding software. The use of the "delete" function in software packages is not a secure or sufficient method of destruction.

RETENTION SCHEDULE

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	1	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	1	Records relating to councils and committees initiated by the Archdiocese. Also records of councils and committees where the Archdiocese has significant involvement. Includes Bishops Conferences, Secretariats etc.	Minutes and agenda of meetings and committee decisions	Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	1	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	2	Records relating to Archdiocesan representation on external committees. Also records of routine correspondence with committees where the Archdiocese has significant involvement.	Minutes and agenda of meetings and committee decisions	Temporary - Retain 5 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	2	Inter-Faith Relations Scope: The activity of communicating and maintaining relations with Heads of Christian Churches, Catholic Lutheran Dialogue, Catholic Jewish Dialogue the Diocesan Commission for Ecumenism & Multi-Faith.	1	Records documenting discussions and significant meetings.	Minutes, agenda and proceedings of meetings	Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	2	Inter-Faith Relations Scope: The activity of communicating and maintaining relations with Heads of Christian Churches, Catholic Lutheran Dialogue, Catholic Jewish Dialogue the Diocesan Commission for Ecumenism & Multi-Faith.	2	Records of the South Australian Heads of Churches meetings. The records move with the rotating Chairperson.	Minutes, agenda and proceedings of meetings	Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	2	Inter-Faith Relations Scope: The activity of communicating and maintaining relations with Heads of Christian Churches, Catholic Lutheran Dialogue, Catholic Jewish Dialogue the Diocesan Commission for Ecumenism & Multi-Faith.	3	Records of routine communications with other churches (usually kept in individual dossier files).		Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	3	Laity Scope: The activity of communicating and managing relations with lay persons.	1	Records relating to arrangements, correspondence and relationship with lay persons or organisations.	Dossier files for each association by name	Temporary - Retain 5 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	4	Other Dioceses Scope: The activity of communicating and managing relations with other dioceses within the Catholic church.	1	Significant records relating to other dioceses, including individual files for each diocese.	Dossier files for each Diocese by name.	Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses	4	Other Dioceses Scope: The activity of communicating and managing relations with other dioceses within the Catholic church.	2	Records of routine communications with other dioceses (usually kept in individual dossier files).	Dossier files for each Diocese by name.	Temporary - Retain 5 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	5	Overseas Aid Scope: The activities associated with agencies providing overseas aid and development.	1	Records relating to fundraising for overseas aid purposes. SEE - FINANCIAL MANAGEMENT - Accounting 5.1 for financial records not relating to Overseas Aid.	Contact database, bank statements, receipts.	Temporary - Retain 6 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	6	Papal Audiences Scope: The activities of arranging tickets on behalf of parishioners and/or other members of the community to a Papal audience, either at the Vatican or at another location. Includes correspondence and liaison with the relevant Parish Priest and individuals.	1	Records relating to arranging Papal Audiences.		Temporary - Destroy 7 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations the Vatican and other dioceses, including local dioceses.	7	Papal Awards Scope: The activities involved in liaising with parishioners and Vatican Agencies concerning Papal Awards. Includes correspondence and liaison with the relevant Parish Priest and the recipients.	1	Records relating to arranging Papal Awards.		Temporary - Destroy 7 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations the Vatican and other dioceses, including local dioceses.	8	Papal Blessings Scope: The activities involved in liaising with parishioners and other prominent members of the community, and Vatican Agencies concerning Papal Blessings. Includes correspondence with the relevant Parish Priest and the recipients.	1	Records relating to arranging Papal Blessings		Temporary - Destroy 7 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses	9	Secular Relations Scope: The activity of maintaining and managing relations with the religious (but not ordained) Associations of the Archdiocese.	1	Records of routine correspondence and the relationship with other religious organisations.	Dossier files for each association by name	Temporary - Retain 5 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses	10	Vatican Scope: The activity of maintaining and managing relations between the Adelaide Archdiocese and the Vatican.	1	Papal records.	Articles and encyclicals	Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	10	Vatican Scope: The activity of maintaining and managing relations between the Adelaide Archdiocese and the Vatican.	2	Records relating to the Vatican institutes, offices, Pontifical offices and councils, Tribunals and Synods.		Permanent	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses	10	Vatican Scope: The activity of maintaining and managing relations between the Adelaide Archdiocese and the Vatican.	3	Records of routine communication with the Vatican institutes, offices, Pontifical offices and councils, Tribunals and Synods.		Temporary-Retain 5 years after last action	Archdiocese
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses	11	Women and the Church Scope: The activity of maintaining and managing relations with lay women's agencies within the Catholic Church. Includes Commission for Australian Catholic Women and World Union of Catholic Women's Organisations.	1	Records relating to activities through committees and other forums; includes minutes and reports.	Minutes and reports	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
1	CHURCH RELATIONS Scope: The function of maintaining and managing the relationship with other denominations, the Vatican and other dioceses, including local dioceses.	11	Women and the Church Scope: The activity of maintaining and managing relations with lay women's agencies within the Catholic Church. Includes Commission for Australian Catholic Women and World Union of Catholic Women's Organisations.	2	Administrative records and informal correspondence	Correspondence	Temporary - Retain 5 years after last action	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	1	Candidacy Scope: The activity of liaising with persons enquiring about vocations to religious life.	1	Records relating to enquiries re candidacy.		Temporary - Retain 5 years after last action	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	2	Celebrations Scope: The activity associated with activities held to honour a special event.	1	Records relating to anniversaries, jubilee celebrations, special Masses, etc.	Memorabilia, Order of Service, photographs	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	3	Consecration Scope: The activities associated with the ceremony of Episcopal consecration of a Bishop or Archbishop.	1	Records of Episcopal consecrations.	Dossier files and records	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	1	Records relating to councils and committees initiated by the Archdiocese.	Terms of reference, constitution, agenda, minutes, reports.	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	5	Functions (Social) Scope: The activity of organising and managing an official or formal social occasion conducted by the Archdiocese to enhance its internal and external relationships.	1	Records relating to social functions of significance to the Archdiocese or those organised to mark major events such as anniversaries, opening of landmark structures etc.		Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	5	Functions (Social) Scope: The activity of organising and managing an official or formal social occasion conducted by the Archdiocese to enhance its internal and external relationships.	2	Records relating to other (minor) social functions; e.g. clergy golf day.		Temporary - Retain 2 years after last action	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	6	Laicised Priests Scope: The activity of communicating with priests who have been granted laicisation.	1	Records relating to laicised priests.	Dossier files and records	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	7	Ordinations Scope: The activity of conferring the Rite of Holy Orders. Includes the activities associated with requests for ordination from former Anglican clergy.	1	Records of ordinations and/or requests for ordination.	Administrative records; official correspondence; dossier files	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	8	Overseas priests Scope: The activity of communicating with overseas priests enquiring about appointment to the Archdiocese.	1	Correspondence and general administrative records.	Dossier files and records of individual requests	Temporary - Retain 25 years after last action where the request is not approved	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	9	Personal Files Scope: The activity of communicating and managing relations with individual priests and deacons.	1	Records relating to priests and deacons.	Dossier records of individuals	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	10	Seminaries Scope: The activity of communicating and managing relations with Seminary authorities.	1	Records relating to activities through committees and other forums; includes minutes and reports.	Minutes and reports	Permanent	Archdiocese
2	CLERGY Scope: The function of the Archbishop's dealings with all ordained clergy, including religious orders. Records exist for each person.	10	Seminaries Scope: The activity of communicating and managing relations with Seminaries.	2	Administrative records and informal correspondence.	Correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	1	Addresses (Presentations) Scope: The activities associated with giving addresses for training, professional, community relations or pastoral purposes.	1	Records relating to addresses and presentations given by agency representatives at conferences or events. Excludes presentations at staff training, seminars, workshops, etc.	Copies of addresses, speeches and multi media presentations.	Temporary - Destroy 2 years after last action	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	2	Enquiries Scope: The activities associated with handling requests for information about the Archdiocese by the general public or another church or organisation.	1	Records relating to minor enquiries. Includes enquiries referred to another agency for advice and/or response.	Correspondence	Temporary - Destroy 2 years after last action completed	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	2	Enquiries Scope: The activities associated with handling requests for information about the Archdiocese by the general public or another church or organisation.	2	Records relating to major enquiries and/or enquiries of a sensitive or complex nature. Includes enquiries needing special approvals.	Correspondence	Permanent	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	3	Exhibitions Scope: The activities associated with using organisational material in mounted displays for the purpose of informing or educating the viewer, or promoting the activities, services, projects, or programs of the organisation.	1	Records relating to the design, production, setting up opening and publicising of exhibitions and displays.		Temporary - Destroy 2 years after last action	GDS 15
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	4	Greetings Scope: The activities associated with preparing and sending letters of appreciation or condolences. Includes mailing lists for Christmas cards.	1	Records relating to the preparation and sending of greetings. Also includes greetings received by the Archbishop.	Correspondence, letters, greeting cards	Temporary - Destroy 1 year after last action	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	5	Grievances Scope: The activities associated with the handling and resolution of grievances. Includes responding to complaints about issues related to church teachings, ethics, morals, social justice, etc.	1	Records relating to the handling and resolution of minor grievances.	Correspondence	Temporary - Destroy 2 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	5	Grievances Scope: The activities associated with the handling and resolution of grievances. Includes responding to complaints about issues related to church teachings, ethics, morals, social justice, etc.	2	Records relating to the handling and resolution of serious grievances. Includes responding to complaints about issues related to church teachings, ethics, morals and social justice.	Correspondence, including legal advice	Permanent	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	6	Media Relations Scope: The activity of establishing a relationship between the media and the Archbishop. Includes interviews, media releases, public comment etc.	1	Records relating to interviews, media releases public comment etc by the Archbishop.		Permanent	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	7	Special Events Scope: The activity of conducting or participating in special events such as Australia Day Ecumenical Service, Latin Mass, Marian Apparitions, Latin Mass/Tridentine Mass, Anzac Day Mass.	1	Records relating to conducting or participating in special events	Routine correspondence regarding administrative matters and arrangements	Temporary - Destroy 5 years after last action	Archdiocese
3	COMMUNITY RELATIONS Scope: The function of establishing rapport with the community and raising and maintaining the Archdiocese's broad public profile.	7	Special Events Scope: The activity of conducting or participating in special events such as Australia Day Ecumenical Service, Latin Mass, Marian Apparitions, Latin Mass/Tridentine Mass, Anzac Day Mass.	2	Records relating to conducting or participating in special events of national or international significance; e.g. World Youth Day; World Day of the Sick	Correspondence, minutes of meetings, planning notes. Official memorabilia and/or souvenir items	Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	1	Charitable services Scope: The activity of maintaining relationships with agencies that provide charitable services.	1	Administrative records and informal correspondence.	Correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	2	Conferences Scope: The activities involved in arranging or attending conferences held either by the Archdiocese or by other organisations. Includes registrations, publicity and reports of participants.	1	Master copies of programs, presentations, transcripts of speeches, proceedings and reports of conferences held by or presented by the Archdiocesan staff.		Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	2	Conferences Scope: The activities involved in arranging or attending conferences held either by the organisation or by other organisations. Includes registrations, publicity and reports of participants.	2	Records relating to arrangements to hold conferences. Includes program development, publicity, registration of participants, venue, catering, accommodation and transport arrangements etc.		Temporary - Retain 7 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	2	Conferences Scope: The activities involved in arranging or attending conferences held either by the organisation or by other organisations. Includes registrations, publicity and reports of participants.	3	Records relating to other conferences including programs, invitations, proceedings etc.		Temporary - Retain 3 months after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	3	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	1	Records relating to councils and committees initiated by the Archdiocese.	Terms of reference, constitution, agenda, minutes, reports.	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	3	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	2	Records relating to the Archdiocesan representation on external committees.	Nomination, notification, recommendations.	Temporary - Retain 6 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	4	Employment Services Scope: The activity of maintaining relationships with agencies who provide employment services.	1	Administrative records and informal correspondence.	Correspondence	Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	5	Ethical, Moral & Social Issues Scope: The activity of managing the issues of social justice, ecology and ethical investing.	1	Records relating to activities through committees and other forums; includes minutes and reports.	Minutes and reports	Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	5	Ethical, Moral & Social Issues Scope: The activity of managing the issues of social justice, ecology and ethical investing.	2	Administrative records and informal correspondence.	Correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	6	Faith and Education Services Scope: The activity of maintaining relationships with agencies who provide faith and/or education services.	1	Records relating to activities through committees and other forums; includes policy decisions concerning courses and other faith and education activities.	Minutes and reports; policies and procedures involving Catholic Adult Education Services [CAES] & Catholic Theological College [CTC]	Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	6	Faith and Education Services Scope: The activity of maintaining relationships with agencies who provide faith and/or education services.	2	Records relating specifically to relationship with education and faith forums	Commissions, festivals, programs in education. Includes routine correspondence with Catholic Adult Education Services [CAES] & Catholic Theological College [CTC]	Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	7	Fundraising Scope: The activity of the Archbishop's involvement in parish fundraising.	1	Records relating to activities through committees and other forums; includes minutes and reports.	Minutes and reports	Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	7	Fundraising Scope: The activity of the Archbishop's involvement in parish fundraising.	2	Records relating to routine matters associated with fund raising activities	Records of routine correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	8	Multicultural Services Scope: The activity of maintaining relationships with agencies who provide multicultural services.	1	Administrative records and general correspondence.	Routine correspondence regarding administrative matters	Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	8	Multicultural Services Scope: The activity of maintaining relationships with agencies who provide multicultural services.	2	Records relating to the relationship with multicultural communities.	Dossier files and records for each community	Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	9	Pastoral Services Scope: The activity of maintaining relationships with agencies and lay organisations who provide pastoral care and support within the Archdiocese	1	Routine correspondence and/or records of a general or ephemeral nature	Routine correspondence pamphlets, ephemera	Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	9	Pastoral Services Scope: The activity of maintaining relationships with agencies and lay organisations who provide pastoral care and support within the Archdiocese	2	Records relating to the formal relationships with agencies and lay organisations	Dossier files for individual agencies and groups	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	10	Reporting Scope: The activity of requesting an ad hoc report from any agency providing services in the Archdiocese.	1	Records relating to the reporting of programmes, projects and events.		Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	10	Reporting Scope: The activity of requesting an ad hoc report from any agency providing services in the Archdiocese.	2	Records relating to support documentation, surveys and questionnaires completed by the Archdiocese in response to external organisations. Includes Bureau of Statistics returns.	Support documentation, working papers, statistics, reviews and returns	Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	11	Schools, Colleges and Education Scope: The activity of maintaining relations with the Catholic Education Office and individual schools and colleges	1	Records relating to the management and provision of school curriculum and education services generally; includes records of appointments to school boards and other significant appointments.		Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	11	Schools, Colleges and Education Scope: The activity of maintaining relations with the Catholic Education Office and individual schools and colleges	2	Administrative records and routine correspondence		Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	12	Vocational Services Scope: The activity of maintaining relationships with agencies who provide vocational services.	1	Records relating to the reporting of programmes, projects and events (does not include routine correspondence or routine administrative records).		Permanent	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	12	Vocational Services Scope: The activity of maintaining relationships with agencies who provide vocational services.	2	Routine correspondence and administrative records		Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	13	Youth Celebrations Scope: The activity of maintaining relationships with young people and youth organisations.	1	Routine correspondence and administrative records		Temporary - Retain 5 years after last action	Archdiocese
4	DIOCESAN RELATIONS Scope: The function of planning and implementing policies and programs that enable the Archdiocese to provide charitable, social and educational services to the community through outreach programs and/or specific church Agencies. Includes those Agencies who are responsible to the Vicar-General (Moderator).	13	Youth Celebrations Scope: The activity of maintaining relationships with young people and youth organisations.	2	Records relating to the reporting of programmes, projects and events (does not include routine correspondence or routine administrative records).		Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	1	Acquisition Scope: The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions.	1	Records relating to the acquisition of equipment and stores.	Successful quotes, requisitions	Temporary - Retain 6 years after last action	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	2	Disposal Scope: The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction.	1	Records relating to the disposal of equipment and stores.	Auction lists, schedules	Temporary - Retain 7 years after last action	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	3	Leasing Scope: The activities involved in leasing to or from another person or organisation.	1	Leasing documents including special leases, sub-leases, licences and other registered documents.	Lease documents, licences	Temporary - Retain 6 years after lease expiry date.	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	4	Maintenance Scope: The activity of managing the upkeep, repair, servicing and preservation of internal / external conditions of premises, equipment, vehicles etc.	1	Records relating to maintenance programmes and maintenance and use of equipment and stores.	Schedules, service records, log books, meter readings	Temporary - Retain 6 years after last action	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	5	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	1	Register of all tenders.	Register	Permanent	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	5	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	2	Major successful tenders, specification documentation and schedule of tenders.	Tender, specifications	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	5	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	3	Minor successful tenders, specification documents and schedule of tenders.	Tender, specifications	Temporary - Retain 7 years after last action	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	5	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	4	Records relating to the routine administration of tendering process.	Advertisements, invitations to tender, registrations of interest	Temporary - Retain 2 years after last action	GDS20
5	EQUIPMENT & STORES Scope: The function of acquiring, supplying, maintaining, repairing and disposing of equipment and stores.	5	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	5	Records relating to unsuccessful tenders.	Responses, notification of rejection	Temporary - Retain 2 years after contract is let.	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	1	Records relating to the Archdiocesan Australian Business Number (ABN) and other evidence of compliance with government consumer and business law.	Archdiocesan ABN notification. Registrations of business names, Investigations, complaints	Permanent.	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	2	Master records and source documents relating to the management of revenue and expenditure. Includes hard copy and computer output equivalents. SEE - CHURCH RELATIONS - Overseas Aid 1.6.1 for financial records relating to Overseas Aid.	Invoices, cheques, purchase orders, claims and payment vouchers, cash books, sales tax records, transaction reports (EFTPOS), trial balance	Temporary - Retain 6 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	3	Records relating to evidence of payments and balance calculations.	EFTPOS payments slips, cashier rolls, receipts, tally sheets, drawer balance reports, cashier discrepancies	Temporary - Retain 2 years after reconciled or 6 years if not reconciled.	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	4	Records relating to banking matters.	Bank deposit statements, investments and statements, reconciliations, credit card usage by the Archdiocese, cancelled, lost, replaced and dishonoured cheques	Temporary - Retain 6 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	5	Records relating to deficiencies and losses.	Actual, attempted or suspected fraud, theft, misappropriation or negligence, write-offs, overpayments, recovery of debts	Temporary - Retain 6 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	6	Records relating to taxation matters. Includes assessments and payment of Fringe Benefits tax (FBT) and Goods and Services tax (GST) and supporting documentation. Also includes requests for exemption from Wholesale Sales Tax and records relating to other forms of tax.	Vehicle log books, business activity statements, GST compliance reports, Exempt Licences, ABN notification	Temporary - Retain 7years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	1	Accounting Scope: The process of collecting, recording, classifying, summarising and analysing information on financial transactions, and subsequently on the financial position and operating results of the organisation.	7	Records relating to investments, loans issued or procured by the Archdiocese.	Loan agreement, statements, loan discharge, extension request. Risk assessment, feasibility studies, reports, reviews, dividends, statements	Temporary - Retain 6 years after loan expiry date.	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	2	Arrangements Scope: The activities involved in making or formalising arrangements (i.e. arrangements for the receipt of incomes or subsidies, e.g. stipends, pensions or rent allowances).	1	Records of formal arrangements entered into.		Permanent	Archdiocese
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	3	Audit Scope: The activity of officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the Archdiocese in a specified period. Includes compliance audits, financial audits, operational audits, recordkeeping audits, skills audits, system audits and quality assurance audits.	1	Internal and external audit reports.	Reports	Permanent	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	3	Audit Scope: The activity of officially checking financial, quality assurance and operational records to ensure they have been kept and maintained in accordance with agreed or legislated standards and correctly record the events, processes and business of the Archdiocese in a specified period. Includes compliance audits, financial audits, operational audits, recordkeeping audits, skills audits, system audits and quality assurance audits.	2	Records relating to internal audits and their arrangements.	Audit trail, system reports, working papers. Appointments, requests from the auditor	Temporary - Retain 7 years after last action	Archdiocese
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	4	Budgeting Scope: The process of planning the use of expected income and expenditure over a specified period.	1	Annual budget document and budget review documents.	Budget	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	4	Budgeting Scope: The process of planning the use of expected income and expenditure over a specified period.	2	Estimates regarding new proposals or programmes where details, justification, and background is provided. Includes records relating to the formulation and administration of the budget.	Estimates. Line items report, budget request forms, variation sheets	Temporary - Retain 5 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	4	Budgeting Scope: The process of planning the use of expected income and expenditure over a specified period.	3	Draft budget documents and working papers.		Temporary - Retain 3 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	5	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards	1	Records relating to archdiocesan compliance with accountability requirements relating to financial management. Includes registration of Australian Business Number (ABN).		Temporary - Retain 7 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	6	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	1	Records relating to councils and committees initiated by the Archdiocese. This includes Parish Finance Councils.	Terms of reference, constitution, agenda, minutes, reports	Permanent	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	6	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	2	Records relating to the Archdiocesan representation on external committees.	Nomination, notification, recommendations	Temporary - Retain 6 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	7	Donations Scope: The activity of managing money, items, artefacts or property donated to the Archdiocese, or by the organisation and or its staff to charities etc. Includes managing unsolicited donations.	1	Records relating to significant donations given to, or issued by, the Archdiocese. Includes property, money, equipment, etc.	Notification, reports, acknowledgement, register	Permanent	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	8	Grant Funding Scope: The activities associated with the application for and receipt of grants.	1	Records relating to the administration of grants and subsidies received by the Archdiocese. Includes those received for specific purposes.	Application, approvals, returns, reports	Permanent	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	8	Grant Funding Scope: The activities associated with the application for and receipt of grants.	2	Records relating to unsuccessful applications made by or to the Archdiocese.	Applications, refusals, reports	Temporary - Retain 6 years after last action	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	9	Insurance Scope: The activity of taking out premiums to cover loss or damage to property, premises or vehicles and to cover customers, and staff against injury or death resulting from incidents on Church premises or whilst engaged in employment.	1	Management of workers compensation insurance policies and levies covering Archdiocese staff against injury or death resulting from accidents or incidents whilst on duty.	Policy, policy amendments, placing slips, renewal certificates	Temporary - Retain 30 years after policy or levy expiry date.	GDS20
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	9	Insurance Scope: The activity of taking out premiums to cover loss or damage to property, premises or vehicles and to cover customers, and staff against injury or death resulting from incidents on Church premises or whilst engaged in employment.	2	Management of insurance claims and policies covering loss or damage to property and vehicles.	Policy, policy amendments, placing slips, renewal certificates	Temporary - Retain 7 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	10	Legal Matters Scope: The processes and activities involved in managing legal matters, such as the drawing up of legal arrangements, as well as compliance with legal and fiscal requirements for [for example] common seal of incorporation, trusts etc	1	Management of constitutional arrangements, legal and governance matters	Records related to constitutional arrangements, property and land transactions, deeds, incorporation of trusts	Permanent	Archdiocese
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	11	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings, which focus on the financial management function.	Agenda, minutes	Permanent	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	1	Master records relating to staff salaries. Includes positions, substantive salaries, allowances, overtime, penalties, deductions, superannuation contributions, leave, adjustments, variations, etc.		Temporary - Retain 7 years after preparation.	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	2	Supplementary records relating to staff salaries. Includes leave applications and approvals, time sheets, certificates etc.	Leave applications, approvals/refusals, timesheets	Temporary - Retain 7 years after processing.	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	3	Regular or periodic system reports relating to employee salaries and entitlements, including progress reports on the Archdiocesan liability.	Reports	Temporary - Retain 2 years after last action	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	4	Records relating to fringe benefits tax returns including declarations and supporting documentation, for example vehicle log books.	Declarations	Temporary - Retain 7 years after last action	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	5	Archdiocesan copies of group certificates and staff termination payment statements.	Group certificates, termination payment statements	Temporary - Retain 7 years after last action	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	12	Salaries Scope: The process of managing the payment of salaries to personnel.	6	Records relating to staff income tax declarations. Includes staff tax file numbers.		Temporary - Retain 1 year after superseded or one year after separation.	GDS15
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	13	Superannuation Scope: The activity of managing superannuation funds on behalf of the Archdiocese and the payment of superannuation to personnel	1	Records relating to the management and operations of the CCSSF(SA)		Permanent	Archdiocese
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	14	Treasury Management Scope: The process of managing the funds of the Archdiocese in an efficient and economical manner by ensuring an effective system of internal control is in operation. Includes investments and loans	1	Records relating to management of the Archdiocese's appropriations, investments, loans, and trust accounts.	Investment and loan agreements, statements, discharges. Reports, reviews, dividends, statements	Temporary - Destroy 7 years after last action completed	GDS 15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
6	FINANCIAL MANAGEMENT Scope: The function of managing the Archdiocesan financial resources. Includes establishing, operating, and maintaining accounting systems controls and procedures, financial planning, framing budgets and budget submissions.	15	Vehicle Management Scope: The activity of acquiring, managing, maintaining, repairing and disposing of vehicles.	1	Records relating to the acquisition, maintenance and disposal of vehicles.	Registration	Temporary - Retain 7 years after disposal of vehicle	GDS20
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the Archdiocese and those processes of government not covered by other general administrative or functional keywords. Includes the Archdiocese's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	1	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	1	Records relating to inspections and investigations. Includes precedent setting cases resulting in major changes to workplaces and work practices.		Permanent	GSS20
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the Archdiocese and those processes of government not covered by other general administrative or functional keywords. Includes the Archdiocese's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	2	Inquiries Scope: The activities associated with liaising with bodies carrying out inquiries, and participating in them. Inquiries are investigations carried out by persons who have been empowered to inquire and report on a subject, and the Archdiocesan participation in providing evidence in the form of records, submissions or staff.	1	Records relating to inquiries, including recommendations and submissions by the Archdiocese.	Reports, submissions and official responses	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the Archdiocese and those processes of government not covered by other general administrative or functional keywords. Includes the Archdiocese's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	2	Inquiries Scope: The activities associated with liaising with bodies carrying out inquiries, and participating in them. Inquiries are investigations carried out by persons who have been empowered to inquire and report on a subject. Includes Archdiocesan responses, submissions etc.	2	Records relating to inquiries where there is little or no action taken by the Archdiocese.	Routine correspondence	Temporary - Retain 5 years after last action	GDS20
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the organisation and those processes of government not covered by other general administrative or functional keywords. Includes the organisation's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	3	Liaison Scope: The activities associated with maintaining regular contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes the activities associated with offering opinions of the Archdiocese as to an action or judgment.	1	Provision of high level advice to the Archbishop, to and from the Archdiocese and government bodies. <i>NB: For records articulating the Church's position on issues, see SOCIAL & WELFARE SERVICES - Medical and Moral</i>	Request for advice, Archdiocesan responses, etc.	Permanent	GDS20
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the organisation and those processes of government not covered by other general administrative or functional keywords. Includes the organisation's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	3	Liaison Scope: The activities associated with maintaining regular contact between the organisation and professional associations, professionals in related fields, other private sector organisations and community groups. Includes the activities associated with offering opinions of the Archdiocese as to an action or judgment.	2	Records relating to advice on routine operational matters.	Requests for advice, Archdiocesan responses, etc.	Temporary - Retain 5 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
7	GOVERNMENT RELATIONS Scope: The function of administering the formal relationship between the organisation and those processes of government not covered by other general administrative or functional keywords. Includes the organisation's relationship with Ministers and Members of Parliament and the political processes of Government; liaison with bodies carrying out investigations and participating in formal inquires and investigations. Includes relationships with other Local, State and Commonwealth governments.	4	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings held for routine or general administrative purposes.		Temporary - Retain 5 years after last action	GDS15
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	1	Agreements Scope: The activity of the establishment, maintenance, review and negotiation of agreements. In the case of religious orders and/or congregational agreements, further specify by community name and person.	1	Signed agreements and accompanying documentation		Permanent	Archdiocese
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	2	Compensation Scope: The activity of providing compensation to personnel injured during working hours or on the Archdiocesan premises. Includes rehabilitation of injured workers	1	Register of compensation claims.		Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	2	Compensation Scope: The activity of providing compensation to personnel injured during working hours or on the Archdiocesan premises. Includes rehabilitation of injured workers.	2	Management of claims under the Workers Rehabilitation and Compensation Act 1986, and predecessor legislation. Includes incident reports, medical reports, advice, appeals, litigation, payments and other information related to the case.		Temporary - Destroy 85 years after the workers date of birth or 7 years after the case is closed, whichever is later	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	2	Compensation Scope: The activity of providing compensation to personnel injured during working hours or on the Archdiocesan premises. Includes rehabilitation of injured workers.	3	Archdiocesan records relating to appeals to the Workers Compensation Tribunal, Supreme Court or other external authority, relating to specific compensation cases.		Temporary - Retain 10 years after all action completed	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	1	Records relating to inspections and investigations into major workplace health and safety hazards, Includes precedent setting cases resulting in major changes to workplaces and work practices.	Audit inspection reports, material safety data sheets	Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	2	Records relating to evidence of compliance with equal opportunity or disability discrimination provisions.	Investigations, complaints	Temporary - Retain 7 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	1	Records relating to councils and committees initiated by the Archdiocese.	Terms of reference, constitution, agenda, minutes, reports.	Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	2	Records relating to the Archdiocesan representation on external committees.	Nomination, notification, recommendations	Temporary - Retain 6 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	5	Counselling Scope: The activity of Agencies providing counselling services within the Diocese.	1	Records relating to arrangements for staff to receive counselling for any purpose.		Temporary - Retain 2 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	6	Employment Conditions Scope: The activities associated with managing the general conditions of employment for personnel.	1	Management of general conditions of employment for staff. Includes overtime, working hours, provision of cars, study assistance, management of rosters, conditions of flexi-time and taking of leave, child care, etc. Also includes management of redeployment programmes.	RDO listings, templates for timesheet, rosters, leave.	Temporary - Retain 6 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants	7	Grievances Scope: The activities associated with the handling and resolution of grievances. Includes handling complaints over perceived discrimination, or those arising over work environment, work organisation or distribution, peers, supervisors or subordinates. Also includes grievances regarding the provision of access to opportunities such as training, equipment, promotion or higher duties.	1	Records relating to serious grievances and complaints, involving the use of external mediation to resolve the matter and/or which result in changes to policy and procedures.	Dossier files including records of complaints, investigations, terms of reference, resolution process	Permanent	GDS15
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants	7	Grievances Scope: The activities associated with the handling and resolution of grievances. Includes handling complaints over perceived discrimination, or those arising over work environment, work organisation or distribution, peers, supervisors or subordinates. Also includes grievances regarding the provision of access to opportunities such as training, equipment, promotion or higher duties.	2	Records relating to the resolution of grievances and complaints within the archdiocese or archdiocesan agency	Working files, notes	Temporary - Retain 3 years after last action.	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	8	Health Promotion Scope: The process of promotion by the organisation of programs which encourage the establishment and maintenance of a healthy work environment.	1	Records relating to health promotion programs		Temporary - Retain 6 years after last action	GDS 20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	9	Industrial Relations Scope: The activities associated with managing the formal relations with the Archdiocesan employees and their representatives to achieve a harmonious workplace.	1	Records relating to negotiation and implementation of Workplace Agreements.	Agreement.	Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	9	Industrial Relations Scope: The activities associated with managing the formal relations with the Archdiocesan employees and their representatives to achieve a harmonious workplace.	2	Records relating to industrial action and/or disputes that have any impact on the Archdiocese's operations or are of a precedent setting nature.		Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	10	Leave Scope: The activity of administering leave for which staff are eligible. Includes unauthorised leave taken by staff.	1	Records relating to leave required to calculate leave entitlements.	Schedule of leave, evidence of commencement of employment	Temporary - Retain 6 years after separation.	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	10	Leave Scope: The activity of administering leave for which staff are eligible. Includes unauthorised leave taken by staff.	2	Records relating to the application, granting and refusal for leave.	Applications, approvals, refusals, medical certificates	Temporary - Retain 2 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	11	Personnel Management Scope: The activities involved in maintaining, personal information about employees for a range of personnel management functions.	1	Records relating to staff attendance.	Timesheets, adjustment forms, exception forms	Temporary - Retain 7 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	11	Personnel Management Scope: The activities involved in maintaining, personal information about employees for a range of personnel management functions.	2	Personal files for the clergy and members of religious orders.	Position description, contract of employment, application for employment, training courses attended, classification, study leave applications, emergency contacts, police record check, resignation	Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	11	Personnel Management Scope: The activities involved in maintaining, personal information about employees for a range of personnel management functions.	3	Personnel files for staff - non-religious.	Position description, contract of employment, application for employment, appointment reassignments, study leave, training courses attended, classification, study leave applications, emergency contacts, police record check, resignation	Temporary - Retain 85 years after employees date of birth or 7 years after last action whichever is later	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	12	Recruitment Scope: The process of recruiting which includes applying for approval to fill existing vacancies, the advertising of vacant positions and the handling of applications, interviews, selection, culling and appointment.	1	Records relating to the selection process. Includes establishment of selection panel, selection criteria and interview questions.	Advertisements, interview.	Temporary - Retain 2 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	12	Recruitment Scope: The process of recruiting which includes applying for approval to fill existing vacancies, the advertising of vacant positions and the handling of applications, interviews, selection, culling and appointment.	2	Unsuccessful job applications.	Applications notifications	Temporary - Retain 1 year after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	12	Recruitment Scope: The process of recruiting which includes applying for approval to fill existing vacancies, the advertising of vacant positions and the handling of applications, interviews, selection, culling and appointment.	3	Unsolicited job applications.	Applications	Temporary - Retain 3 months after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	12	Recruitment Scope: The process of recruiting which includes applying for approval to fill existing vacancies, the advertising of vacant positions and the handling of applications, interviews, selection, culling and appointment.	4	Records relating to the selection process and recruitment of CEO's (or the equivalent) and Directors.	Appointments, selection criteria, advertisements	Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	13	Rehabilitation Scope: The activity of managing programs designed to restore the injured worker to the fullest physical, psychological, social, vocational and economic usefulness of which they are capable - consistent with pre-injury status.	1	Records relating to the development of rehabilitation programmes. Includes case files.		Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	14	Reporting Scope: The activity of requesting an ad hoc report from any agency providing services in the Archdiocese.	1	Records relating to the reporting of programmes, projects and events.		Permanent	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	14	Reporting Scope: The activity of requesting an ad hoc report from any agency providing services in the Archdiocese.	2	Records relating to support documentation, surveys and questionnaires completed by the Archdiocese in response to external organisations. Includes Bureau of Statistics returns.	Support documentation, working papers, statistics, reviews and returns	Temporary - Retain 5 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	15	Security Scope: The activity of managing measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	1	Records relating to classifying and administering security levels of staff and volunteers. Includes checking police and criminal records and reporting of security incidents.		Temporary - Retain 7 years after separation.	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	15	Security Scope: The activity of managing measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	2	Records relating to the issue of security passes, keys, fobs etc to staff and volunteers. Includes registers of pass and key holders.		Temporary - Retain 1 year after arrangements superseded	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	16	Training and Development Scope: The activity of encouraging staff to develop their skills and abilities to maximise their potential and increase their productivity.	1	Records relating to the development of course material for training staff. This includes the final version of the course to be delivered. Includes courses conducted by the Archdiocese or external consultants.		Temporary - Retain 5 years after last action	GDS20
8	HUMAN RESOURCES MANAGEMENT Scope: The function of recruiting, managing, training and providing for employees in the Archdiocese. Employees include permanent, contract, temporary and part-time trainees, apprentices, scholarships and job creation scheme participants.	16	Training and Development Scope: The activity of encouraging staff to develop their skills and abilities to maximise their potential and increase their productivity.	2	Arrangements for and evaluation of external training programmes in relation to Archdiocese staff development needs. Includes transport, programmes, authorisations, entitlements, venue bookings, hire of equipment, catering, rosters, etc.		Temporary - Retain 2 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records.	1	Acquisition Scope: The activity of gaining ownership or use of property and other items required in the conduct of business. Includes acquisition of external publications and library type resources	1	Records relating to the acquisition of external publications and library materials, including subscriptions to journals, orders, approvals, etc.		Temporary - Destroy 7 years after last action	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records.	2	Conservation Scope: The activity involving the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artefacts	1	Records relating to Records relating to the preservation of records and other information resources. Also includes disaster plans and the identification of vital records.		Temporary - Destroy 2 years after last action	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	2	Conservation Scope: The activity involving the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artefacts	2	Records relating to specialised conservation projects for Archdiocesan records, for example conservation projects for specific collections of records such as photographs. Includes conservation surveys and services of consultants.		Permanent	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	3	Control Scope: The activity of creating, maintaining and evaluating control mechanisms. Includes classification, indexing, registration, forms design etc. to ensure maximum control over records and recordkeeping systems.	1	Master records relating to central control of Archdiocesan recordkeeping systems. Includes registers and indexes giving details of control numbers, titles, record abstracts, date ranges, records transferred to archives, destruction dates, etc. Also includes details of file and document registration and disposal on electronic document and records management systems.		Permanent	GDS 15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	3	Control Scope: The activity of creating, maintaining and evaluating control mechanisms. Includes classification, indexing, registration, forms design etc. to ensure maximum control over records and recordkeeping systems.	2	Records relating to the arrangements for the receipt and dispatch of mail. Includes courier services and electronic data interchange.		Temporary - Destroy 7 years after last action	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	4	Data Administration Scope: The activity of building, prototyping and testing of databases. Includes the management of user rules, passwords, regular programs of backups and journals and monitoring usage and response times	1	Records relating to the planning and management of information systems. Includes migration of data to successor systems.		Temporary - Destroy 7 years after system closed or superseded, or data migrated to successor system	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	4	Data Administration Scope: The activity of building, prototyping and testing of databases. Includes the management of user rules, passwords, regular programs of backups and journals and monitoring usage and response times	2	Records relating to the management of metadata. Includes that attached to databases, documents, electronic records, electronic recordkeeping systems, websites and workflow.		Permanent	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	5	Disposal Scope: The activity of disposing of items no longer required by the Archdiocese. Includes destruction or transfer to Archives, and the program of activities to facilitate the orderly transfer of semi-active and inactive records from current office space into archival storage	1	Records relating to the management of inactive, non-permanent records, including authorised destruction. Also includes transfer of non-permanent records to secondary storage and destruction certificates.		Temporary - Destroy 50 years after records destroyed	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	6	Enquiries Scope: The activities associated with handling requests for information about the Archdiocese by the general public or another church or organisation.	1	Records relating to minor enquiries and/or enquiries of a general nature. Includes family history services general historical research.	Correspondence, including emails and faxes. Contact logs	Temporary - Destroy 7 years after last action completed	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	6	Enquiries Scope: The activities associated with handling requests for information about the Archdiocese by the general public or another church or organisation.	2	Records relating to major enquiries and/or enquiries of a sensitive or complex nature. Includes enquiries needing special approvals	Correspondence, including emails and faxes. Contact logs	Permanent	Archdiocese
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	7	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings, which focus on the information management function.	Agenda, minutes.	Permanent	GDS15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	8	Policy Scope: The activity of developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the Archdiocese's operating procedures are established	1	Records relating to high level decision making, for example strategic management or corporate executive decisions.		Permanent	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	9	Privacy Scope: The activity associated with applying the principles of privacy. Includes data protection in relation to privacy. Also includes the process of collection, handling, use and disclosure of records of a private, personal or confidential nature to maintain that the rights of a person (or immediate family) are secure from unauthorised disclosure.	1	Records of a personal, private or confidential nature	Records documenting the application of the National privacy principles (NPP) outlined in the Privacy Amendment Act 2000	Temporary – Destroy 5 years after last action	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	10	Procedures Scope: The activity of establishing methods of operating laid down by the Archdiocese according to formulated policy.	1	Records relating to the development and implementation of Archdiocesan procedures concerning information management.		Temporary Destroy 5 years after last action completed	GDS 15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	11	Risk Management Scope: The process of identifying risks, and implementing appropriate practices and procedures to reduce wastage and the impact of economic loss arising from an incident	1	Records relating to identifying risks, and implementing appropriate practices and procedures		Temporary - Destroy 5 years after last action completed	GDS 15
9	INFORMATION MANAGEMENT Scope: The function of managing the Archdiocese's information resources. Includes creating, capturing, registering, classifying, indexing, storing, retrieving and disposing of records and developing strategies to manage records	11	Risk Management Scope: The process of identifying risks, and implementing appropriate practices and procedures to reduce wastage and the impact of economic loss arising from an incident	2	Master copy of risk management plans.		Permanent	GDS 15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and co-coordinating occupational health and safety and associated legislation throughout the organisation.	1	Accidents Scope: The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the Archdiocesan property or member of staff incurred while coming to, at, or leaving work, or to the general public or visitors whilst on Archdiocesan premises.	1	Records relating to the management of personal injuries to Archdiocesan staff and volunteers not resulting in claims for compensation. Includes official accident and incident reports	Accident reports, incident reports.	Temporary - Retain 45 years after date of last entry	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	1	Accidents Scope: The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the Archdiocesan property or member of staff incurred while coming to, at, or leaving work, or to the general public or visitors whilst on Archdiocesan premises.	2	Records relating to the management of personal injuries to visitors not resulting in claims for compensation. Includes records relating to the management of reports of damage to property.		Temporary - Retain 75 years after worker's date of birth or 7 years after case is closed, whichever is the later	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	1	Accidents Scope: The activities involved in dealing with mishaps causing injury or damage. Includes damage or injury to the Archdiocesan property or member of staff incurred while coming to, at, or leaving work, or to the general public or visitors whilst on the Archdiocesan premises.	3	Register of accidents and incidents.	Register.	Permanent	GDS30

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	2	Claims Scope: The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.	1	Records relating to the management of claims under the <i>Workers Rehabilitation and Compensation Act 1986</i> . Includes incident reports, medical records, advice, appeals, litigation, payments and other information related to the case.	Incident reports, medical records.	Temporary - Retain 75 years after worker's date of birth or 7 years after case is closed, whichever is the later	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	2	Claims Scope: The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.	2	Archdiocesan records relating to appeals to the Workers Compensation Tribunal, Supreme Court or other external authority relating to specific compensation cases.		Temporary - Retain 10 years after action completed	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	2	Claims Scope: The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.	3	Records relating to the management of compensation claims for personal injury, loss or damage to property made by or on behalf of visitors to Archdiocesan offices. Includes volunteers and work experience students.		Temporary - Retain 75 years after worker's date of birth or 7 years after case is closed, whichever is the later	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	2	Claims Scope: The process of administering and managing payments demanded in accordance with an insurance policy as compensation for injury, death, or denial of rights of a person, or damage to or destruction of property. Includes disputes over rights and ownership, and recompense sought for stolen or lost property.	4	Register of compensation claims.	Register.	Permanent	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	1	Management of complaints by staff about OH&S matters affecting them personally. Includes objections to undertaking hazardous duties and/or working in an unsafe or unhealthy environment. Including Asbestos related complaints.	Complaints, reports.	Temporary - Retain 45 years after date of last action	GDS20
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	2	Records relating to Archdiocesan compliance with mandatory standards or statutory requirements relating to compensation. Includes proof of compliance.		Temporary - Retain 5 years after date of last action	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	3	Records relating to the management of serious and minor breaches of compensation compliance requirements.		Permanent	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	4	Records relating to the management of workplace safety including periodic inspections and investigations into minor hazards or complaints raised by staff. Includes remedial action taken as a result of investigation. Also includes routine reports on health and safety.	Audit inspection reports, material safety data sheets, safety awards.	Temporary - Retain 7 years after date of last action	GDS20
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	1	Records relating to high level committees, for example strategic management or corporate executive committees, established to formulate compensation policy and determine major programs.	Agenda, minutes, reports.	Permanent	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	2	Records relating to external committees for which the Archdiocese provides the secretariat, or provides integral operational advice, or has other major involvement relating to compensation or national church compensation policy.	Agenda, minutes, reports.	Permanent	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	4	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	3	Records relating to nomination and election of Occupational Health and Safety committee.	Nominations, ballot results.	Temporary - Retain 4 years after date of last action	GDS20
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	5	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings discussions, negotiations and submissions concerning OHS management.		Permanent	Archdiocese
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	6	Policy Scope The activity of developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the Arch Diocese's operating procedures are established	1	Records relating to high level decision making, for example strategic management or corporate executive decisions.		Permanent	GDS 15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	7	Procedures Scope: The activity of establishing methods of operating laid down by the Archdiocese according to formulated policy.	1	Records relating to the development and implementation of Archdiocesan general administrative procedures for OH&S.		Temporary - Retain 5 years after last action	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	8	Risk Management Scope: The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	1	Records relating to hazard identification and risk assessment of foreseeable hazards in Archdiocesan work places. Includes measures taken to eliminate or control risks.		Temporary - Retain 40 years after date of last entry	Archdiocese
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and co-coordinating occupational health and safety and associated legislation throughout the organisation.	8	Risk Management Scope: The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	2	Records relating to risk management of hazardous substances in Archdiocesan work places, for example dangerous chemicals, air-borne asbestos, radiation, etc. Includes risk assessment reports, surveillance and monitoring of work place environments, and measures taken to prevent to minimise exposure. Also includes maintenance and distribution of hazardous substances notices and labels, and material safety data sheets.	Risk assessment reports, surveillance reports, Material safety data sheets.	Temporary - Retain 40 years after date of last entry	Archdiocese
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	8	Risk Management Scope: The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	3	Register of hazardous substances at Archdiocesan work places for example asbestos register.	Register.	Permanent.	GDS15
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	9	Training and Development Scope: The activity of encouraging staff to develop their skills and abilities to maximise their potential and increase their productivity.	1	Records relating to the provision of training and induction programmes to Archdiocese staff on OH&S matters. Includes hazard awareness training relevant to specific workplace conditions. Also includes training for managers on their OH&S responsibilities.	Dossier files	Temporary - Retain for duration of the workers' employment	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	9	Training and Development Scope: The activity of encouraging staff to develop their skills and abilities to maximise their potential and increase their productivity.	2	Register of OH&S training arranged by or for the Archdiocese.	Register	Permanent	GDS20
10	OCCUPATIONAL HEALTH & SAFETY Scope: The function of implementing and coordinating occupational health and safety and associated legislation throughout the organisation.	9	Training and Development Scope: The activity of encouraging staff to develop their skills and abilities to maximise their potential and increase their productivity.	3	Records relating to fire safety including fire and warden training, safety certification and reports on fire safety equipment.	Procedures, reports, certificates.	Temporary - Retain 6 years after premises are vacated or systems superseded	GDS20
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	1	Appointments Scope: The process involved in selecting and appointing a person to a position or office within the parish.	1	Records relating to the appointment process. Includes establishment of selection panel where appropriate and interview questions etc.		Permanent	Archdiocese
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	2	Celebrations Scope: The activities associated with the festivities held to honour a particular event	1	Records associated with the celebration	Memorabilia including pamphlets, order of service etc	Permanent	Archdiocese
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	3	Communication Scope: The activity of maintaining and managing communications between the Archdiocese and the relevant Parish, including Installation of Priests, Pastoral Council communications and Sacramental programs.	1	Records relating to the relationship with the parishes.	Dossier files for individual parishes; priest correspondence; NB: For property matters, see PROPERTY MANAGEMENT	Permanent	Archdiocese
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	3	Communication Scope: The activity of maintaining and managing communications between the Archdiocese and the relevant Parish, including Installation of Priests, Pastoral Council communications and Sacramental programs.	2	Records of routine correspondence with the parishes	Administrative records and routine correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	4	Meetings Scope: The activities associated with meetings held to formulate, discuss, update, or resolve issues and matters pertaining to the operations of the congregation within the Archdiocese. Includes arrangements, agenda, taking of minutes etc	1			Permanent	GDS 15
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	4	Meetings Scope: The activities associated with meetings held to formulate, discuss, update, or resolve issues and matters pertaining to the operations of the congregation within the Archdiocese. Includes arrangements, agenda, taking of minutes etc	2	Records relating to non-committee based meetings held for routine or general administrative purposes.		Temporary - Retain 2 years after last action	GDS 15
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	5	Planning Scope: The activity of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs	1			Permanent	GDS 20
11	PARISHES & DEANERIES Scope: The function of the Archbishop's dealings with Parishes and Deaneries	6	Visitation Scope: The activity of managing official visits to the Parish by the Archbishop and/or his delegate	1	Records relating specifically to visits to the parishes.	Regional dossiers	Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	1	Chaplaincy Scope: The activity of providing pastoral and sacramental services to defined groups within the community.	1	Records relating to pastoral services provided to migrant groups, prisons, universities, and hospitals.	Dossier files for the specific chaplaincy	Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	1	Chaplaincy Scope: The activity of providing pastoral and sacramental services to defined groups within the community.	2	Records relating to pastoral services provided to schools and colleges.	Dossier files for the specific school and college	Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	2	Community Animation Scope: The activity of strengthening and building up the catholic community through on-going renewal and formation.	1	Records relating to activities through committees and other forums; includes minutes and reports	Minutes and reports	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	2	Community Animation Scope: The activity of strengthening and building up the catholic community through on-going renewal and formation.	2	Administrative records and informal correspondence	Correspondence	Temporary - Retain 5 years after last action	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	3	Homilies Scope: The activity of preserving homilies and converting them into written format.	1	Hard copy of homily		Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	4	Rural Ministry Scope: The activities associated with the appointment of women and men called to lay ecclesial ministry in rural communities. Includes also the programmes of Preparation and Formation appropriate to the level of responsibilities assigned to the ministries.	1	Records relating to the appointments and role of the Ministries	Dossier files for the specific ministries	Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	5	Social Inclusion Scope: The activity of developing special programs to ensure justice and fairness to members of the church.	1	Records relating to activities through committees and other forums; includes minutes and reports	Minutes and reports	Permanent	Archdiocese
12	PASTORAL RELATIONS Scope: The function of implementing and overseeing activities dealing with the pastoral mission of the church.	5	Social Inclusion Scope: The activity of developing special programs to ensure justice and fairness to members of the church.	2	Administrative records and informal correspondence	Correspondence	Temporary - Retain 5 years after last action	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	1	Councils & Committees Scope: The activity of the management of committees, secretariats and task forces (both internal and external). Includes the committee's establishment, appointment of members, terms of reference, proceedings, minutes, reports and agendas.	1	Records relating to high level committees, for example strategic management or corporate executive committees, established to formulate compensation policy and determine major programs.	Terms of reference, constitution, agenda, minutes and reports	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints	2	Counselling Scope: The activity of Agencies providing counselling services within the Diocese.	1	Records relating to provision of counselling services; includes referrals and other correspondence	Dossier files for individual Agencies and/or individual clients; Director's notebooks documenting casework progression.	Permanent	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	3	GRIEVANCES Scope: The activities associated with the handling and resolution of grievances. Includes responding to complaints about issues related to church teachings, ethics, morals, social justice, etc.	1	Records relating to the management of grievances and complaints	Dossier files for individual complaints and/or issues; Director's notebooks documenting casework progression.	Permanent	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	4	Liaison Scope: The activities associated with maintaining regular general contact between the Archdiocese and professional associations, professionals in related fields, other private sector organisations and community groups. Includes sharing advice and discussions, membership of professional associations and collaborating on projects that are not joint ventures	1	Records relating to the provision of high level advice to the Archbishop, to and from the Archdiocese and to other professional and/or government bodies.	Requests for advice, Archdiocesan responses, Director's notebooks documenting casework progression.	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	5	Litigation Scope: The activities involved in managing lawsuits or legal proceedings between the Archdiocese and other parties.	1	Records relating to lawsuits or legal proceedings	Correspondence, legal documents, Director's notebooks documenting casework progression.	Permanent	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	6	Media Relations Scope: The activity of establishing a relationship between the media and the Archbishop. Includes interviews, media releases, public comment etc.	1	Records relating to interviews, media releases public comment etc by the Archbishop.		Permanent	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	7	Policy Scope: The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the Archdiocese's operating procedures are determined.	1	Records relating to developing and establishing decisions, directions and precedents which act as a reference for future decision making.		Permanent	GDS 15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints	8	Procedures Scope: The activity of establishing methods of operating laid down by the Archdiocese according to formulated policy.	1	Records relating to the development and implementation of Archdiocesan general administrative procedures for Professional Standards.		Temporary - Retain 5 years after last action	GDS15
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	9	Publications Scope: The activities of producing or receiving material, irrespective of format, intended for general distribution internally or to the public	1		Pamphlets, brochures, etc	Temporary - Retain 5 years after last action	Archdiocese
13	PROFESSIONAL STANDARDS Scope: The function of ensuring professional standards of conduct by clergy, church employees, teachers and volunteers, especially in relation to their dealings with minors and the vulnerable in the community. Includes communicating and managing relations with agencies concerned with the development of policies, protocols and procedures for responding to Church-related abuse complaints.	10	Reporting Scope: The activity of initiating or providing a formal response to a situation or request (either internal or external), and to provide formal statements or findings of the results of their examination or investigation.	1	Records relating to the reporting of programmes, projects and events.		Permanent	Archdiocese
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	1	Acquisition Scope: The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions.	1	Register of property owned by the Archdiocese	Register	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	1	Acquisition Scope: The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions.	2	Certificate of Title.	Certificate of Title	Permanent (unless property sold or transferred)	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	1	Acquisition Scope: The process of gaining ownership or use of property and other items required in the conduct of business through purchase or requisitions.	3	Records relating to the acquisition of property. Including identification of easements.	Proposal, successful quotes, requisitions, contract form.	Temporary - Retain 6 years after disposal of property.	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	2	Agreements Scope: The activities associated with establishing, maintaining, reviewing and negotiating agreements	1	Records relating to agreements and arrangements which establish and document the usage of facilities, equipment and space. Includes memoranda of understanding.		Temporary - Destroy 5 years after agreement expires	GDS 15
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	3	Compliance Scope: The activity of complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the Archdiocese is subject. Includes compliance with legislation and with national and international standards.	1	Records relating to the management of a cemetery. Includes cemetery management plan, register of interments and re-interments, register of cremations, exhumation warrants and consents		Permanent	GDS 20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	4	Conservation Scope: The activities involved in the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artefacts.	1	Records relating to conservation and restoration of heritage listed or other significant buildings. Includes records relating to the design and construction of structures.	Plans, submissions, reports, progress reports.	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	4	Conservation Scope: The activities involved in the preservation, protection, maintenance, restoration and enhancement of properties, including buildings and land, and information resources and artefacts.	2	Records relating to rehabilitation of contaminated building or land.	Plans, submissions, reports, progress reports.	Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	5	Construction Scope: The activity of making or building something.	1	Records relating to the construction of major works, i.e. to a value in excess of \$150,000.00.		Permanent	GDS 15
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	5	Construction Scope: The activity of making or building something.	2	Records relating to the construction of minor works, i.e. to a value less than \$150,000.00.		Temporary - Retain until 2040, retention subject to a review at that date.	GDS 15
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	6	Contracting-Out Scope: The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.	1	Records relating to the development of outsourcing policies and project management processes for the Property Management function.		Permanent	GDS 20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	6	Contracting-Out Scope: The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.	2	Records relating to the hiring and use of consultants, contractors and suppliers for minor or routine property management tasks		Destroy 8 years after contract expiry date	GDS 20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	6	Contracting-Out Scope: The activities involved in arranging, procuring and managing the performance of work or the provision of services by an external contractor or consultant, or by using external bureau services. Sometimes referred to as outsourcing.	3	Records relating to the hiring and use of consultants, contractors and suppliers for substantive property management tasks		Permanent	GDS 20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	7	Contracts The activities associated with the receipt and assessment of tenders and the letting of contracts not under seal (simple contracts). Includes reports by consultants, contract documents, payments and contract renewals, etc.	1	Records relating to the letting of contracts not under seal (simple contracts).	Contracts	Temporary - Destroy 7 years after last action	GDS 20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	8	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	1	Records relating to councils and committees initiated by the Archdiocese.	Terms of reference, constitution, agenda, minutes, reports	Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	8	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	2	Records relating to committees not initiated by the Archdiocese. Includes documents relating to meeting arrangements.	Agenda, reports, minutes, notices of meetings, bookings.	Temporary - Retain 2 years after last action	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	9	Disposal Scope: The process of disposing of property no longer required by the organisation, by sale, transfer, termination of lease, auction, or destruction.	1	Records relating to sale or transfer of property.	Disposal order, transaction records, public notices, contract form.	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	10	Donations Scope: The activity of managing money, items, artefacts or property donated to the Archdiocese, or by the organisation and or its staff to charities etc. Includes managing unsolicited donations.	1	Records relating to donations of property received by the Archdiocese.		Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	11	Inventory Scope: The activity of preparing lists of items and assets in the possession of the Archdiocese	1	Records relating to inventories of property.	Reports, lists.	Permanent	GDS15
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	12	Leasing Scope: The activities involved in leasing to or from another person or organisation.	1	Leasing documents including perpetual leases, special leases, sub-leases, licences and other registered documents.	Cemetery grave and property lease documents, licences	Temporary - Retain 6 years after lease expiry date.	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	13	Maintenance Scope: The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.	1	Records relating to the maintenance of trees and vegetation of heritage or other significance.		Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	13	Maintenance Scope: The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.	2	Records relating to maintenance programmes	Maintenance schedules, inspection reports, property inventory, property management programme.	Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	13	Maintenance Scope: The activities associated with the upkeep, repair, servicing and preservation of internal/external conditions of premises, equipment, vehicles etc.	3	Records relating to chemicals and poisons used for weed eradication		Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	14	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings discussions, negotiations and submissions concerning property management.		Permanent	Archdiocese
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	15	Planning Scope: The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	1	Records relating to master copies of approved, Archdiocesan-wide business, corporate strategic plans and policies. Includes revisions.		Permanent	GDS 20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	15	Planning Scope: The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	2	Records relating to the development of Archdiocesan-wide business, strategic or corporate plans and policies.	Working copies and drafts of plans and policies.	Temporary - Retain 5 years after last action	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	16	Security Scope: The activity of managing measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	1	Records relating to security arrangements for premises including installation and maintenance of electronic security and surveillance equipment. Also includes development of security procedures, issue of security passes, security keys, building admittance and visitor's logs.	Reports, registers, key tags, procedures.	Temporary - Retain 6 years after premises vacated or systems superseded	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	16	Security Scope: The activity of managing measures taken to protect people, premises, equipment or information from accidental or intentional damage or from unauthorised access. Includes the security classification of personnel and criminal record checks.	2	Video surveillance tapes.		Temporary - Retain 6 months after last action	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	17	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	1	Register of all tenders		Permanent	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	17	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	2	Major successful tenders, specification documentation and schedule of tenders.		Permanent	GDS20

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	17	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	3	Minor successful tenders, specification documents and schedule of tenders.		Temporary - Retain 7 years after last action	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	17	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	4	Records relating to the routine administration of tendering process.		Temporary - Retain 2 years after last action	GDS20
14	PROPERTY MANAGEMENT Scope: The function of managing land and working, storage or living space within premises, and of acquiring, constructing, fitting-out, managing, maintaining, protecting and disposing of property owned under one name - Diocesan properties, parish properties, school properties	17	Tendering Scope: The activity of receiving and assessing tenders. Includes offers made in writing by one party to another to carry out at an inclusive price or uniform rate, an order for the supply or purchase of goods, or for the production of work.	5	Records relating to unsuccessful tenders.		Temporary - Retain 6 years after last action	GDS20
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	1	Corporate Style Scope: The activity of compiling and administering guidelines on the consistency in written style, graphic design etc within the Archdiocesan documents. Includes designing logos, letterhead, stationery, publications etc.	1	Records relating to the development and implementation of the corporate style for Archdiocese documents, stationery and publications. Includes the creation, design, usage and revision of Archdiocese forms.		Temporary - Retain 2 years after from discontinued or superseded	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	1	Corporate Style Scope: The activity of compiling and administering guidelines on the consistency in written style, graphic design etc within the Archdiocesan documents. Includes designing logos, letterhead, stationery, publications etc.	2	Archdiocese style manuals including revisions and updates.		Temporary - Retain 1 year after revoked or superseded	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	2	Distribution Scope: The activity of disseminating items, correspondence, or publications through sales, deliveries, or other customer services.	1	Records relating to the distribution of Archdiocese publications, including monitoring supply, circulation lists, stock inventories, etc.		Temporary - Retain 2 years after last action	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	3	Intellectual Property Scope: The activity of managing the Archdiocesan intellectual property both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public.	1	Records relating to the establishment of copyright, patents and trademarks administered by the Archdiocese.		Permanent	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	3	Intellectual Property Scope: The activity of managing the Archdiocesan intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public.	2	Records relating to requests from the public or other organisations for permission to reproduce information from the Archdiocesan records or publications. Includes refusals and permissions, and records relating to reproduction of material in which another party holds the copyright.		Temporary - Retain 7 years after action completed	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	3	Intellectual Property Scope: The activity of managing the Archdiocesan intellectual property, both published and unpublished. Includes copyright, patents and trademarks, royalties and matters of confidentiality such as trade secrets which are not available to the public.	3	Administration of royalties received by the Archdiocese.		Temporary - Retain 7 years after action completed	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	4	Production Scope: The activity involved in producing material into an end result or output, e.g. a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.	1	Records relating to arrangements for design and production of Archdiocese publications. Includes printing, copying etc. Also includes arrangements for production of films, videos, multi-media and on-line services.		Temporary - Retain 5 years after last action	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	4	Production Scope: The activity involved in producing material into an end result or output, e.g. a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.	2	Galley proofs, bromides, mock-ups, artwork, camera ready copies, final printing masters etc.		Temporary - Retain 1 year after action completed	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	4	Production Scope: The activity involved in producing material into an end result or output, e.g. a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.	3	Printed or electronically stored periodic "snapshots" of Archdiocese in-house on-line or web based services, including web pages and web sites.		Permanent	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	4	Production Scope: The activity involved in producing material into an end result or output, e.g. a product or publication. Includes design, layout, typesetting, desktop publishing, printing, binding etc.	4	Records relating to materials produced by or for the Archdiocese. Includes memorabilia e.g.. Prayer Card, and/or articles published in journals, books, newspapers, or websites etc.		Permanent	GDS15
15	PUBLICATION Scope: The function of having works, irrespective of format, issued for sale or general distribution internally or to the public.	5	Reviewing Scope: The activities involved in re-evaluating or re-examining products, processes, procedures, standards and systems. Includes recommendations and advice resulting from these activities.	1	Records relating to reviews of Archdiocese publication programs and operations.		Temporary - Retain 5 years after last action	GDS15
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	1	Agreements Scope: The activity of the establishment, maintenance, review and negotiation of agreements. In the case of religious orders and/or congregational agreements, further specify by community name and person.	1	Signed agreements and accompanying documentation.		Permanent	Archdiocese
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	2	Appointments Scope: The process involved in selecting and appointing a person to a position or office.	1	Records relating to the appointment process. Includes establishment of selection panel where appropriate and interview questions etc .		Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	3	Arrangements Scope: The activities involved in making or formalising arrangements (i.e. arrangements for the receipt of incomes or subsidies, e.g. stipends, pensions or rent allowances.	1	Records of formal arrangements entered into		Permanent	Archdiocese
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	4	Meetings Scope: The activities associated with meetings held to formulate, discuss, update, or resolve issues and matters pertaining to the operations of the congregation within the Archdiocese. Includes arrangements, agenda, taking of minutes etc	1	Records relating to non-committee based meetings, which focus on the core functions of the Order and highlight changes to structure and operations.		Permanent	GDS 15
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	4	Meetings Scope: The activities associated with meetings held to formulate, discuss, update, or resolve issues and matters pertaining to the operations of the congregation within the Archdiocese. Includes arrangements, agenda, taking of minutes etc	2	Records relating to non-committee based meetings held for routine or general administrative purposes.		Temporary - Retain 2 years after last action	GDS 15
16	RELIGIOUS CONGREGATIONS Scope: The function of managing the relationship between the Archdiocese and Religious Orders and/or Religious Congregations. Includes [national] Provincial offices and also members of local communities residing within the Archdiocese.	5	Planning Scope: The activity of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs	1			Permanent	GDS 20
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	1	Conferring of Rites Scope: The activity of delegating responsibility for Conferring of Rites	1	Delegation documentation		Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	2	Eucharistic Services Scope: The activity of conducting Eucharistic services at which no consecration of the Species occurs.	1	Records relating to Altar services, breads and wines, etc		Temporary - Retain 5 years after last action	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	3	Exorcism Scope: The activity of conducting services of exorcism.	1	Documented services		Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	4	Homilies Scope: The activity of preserving significant homilies and converting them into written format.	1	Hard copy of homily	Homilies by Archbishop Wilson at important events	Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	5	Liturgical Services Scope: The activities associated with conferring sacraments. Includes reviewing liturgical content for conformance to established church teaching.	1	Records relating to services and service content.	Documented services; rites; decrees	Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	5	Liturgical Services Scope: The activities associated with conferring sacraments. Includes reviewing liturgical content for conformance to established church teaching.	2	Administrative and routine correspondence relating to services.		Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	6	Musical Accompaniment Scope: The activity associated with providing choral and other musical accompaniment to liturgical services and other church celebrations.	1	Records relating to service content and arrangements.		Temporary - Retain 2 years after last action	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	7	Marriage The activities associated with celebration of the Sacrament of Marriage. Includes 'Validation' of marriages; marriages conducted 'Out of Sacred Space' and/or overseas; and marriages conducted in 'other' [non-Catholic] denominations.	1	Correspondence and official documentation including "Letters of Approval".	From Forms; Sanatios; Notification of Freedom to Marry	Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	8	Office for Worship Scope: The activity associated with approval of liturgical content within the diocese.	1	Records relating to accepted styles of worship including set content for services and ceremonies.	Documented worship styles	Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	9	Parochial Records Scope: The activities associated with the keeping of official church records. Includes parochial registers and other official church records.	1	Sacramental Registers;		Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	10	Spirituality Retreats Scope: The activity of conducting faith formation and spirituality seminars.	1	Administrative records and informal correspondence.	Correspondence	Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	10	Spirituality Retreats Scope: The activity of conducting faith formation and spirituality seminars.	2	Records relating to activities through committees and other forums; includes minutes and reports.	Minutes and reports	Permanent	Archdiocese
17	SACRAMENTAL ISSUES Scope: The function of conferring grace or Divine Life on those who worthily receive it as baptism, confirmation, oaths and solemn pledges. The consecrated elements include the Eucharist and others as possess a sacred character.	11	Tribunal of the Catholic Church Scope: The activities associated with the pastoral care of divorced and remarried persons seeking to have their marriage recognised in the church, divorced persons seeking to remarry, and divorced persons seeking clarification of their standing in the Church	1	Personal files documenting the management of formal applications/requests. Includes correspondence, case notes, personal information	Official correspondence; Submissions; Sworn statements	Permanent	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	1	Aged Care Scope: The activity of providing both nursing and non-nursing aged care services by Agencies within the Diocese.	1	Records relating to aged care issues upon which the Archdiocese has a position. These records show the changes in stance through time and illustrate the church in society. Includes issues such as euthanasia. NB: For records relating to advice provided on request to the government, see GOVERNMENT RELATIONS - Liaison.	Dossier files	Permanent	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	1	Aged Care Scope: The activity of providing both nursing and non-nursing aged care services by Agencies within the Diocese.	2	Administrative and routine correspondence relating to social issues upon which the Archdiocese has a position	Dossier files	Temporary - Retain 5 years after last action	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	2	Counselling Scope: The activity of Agencies providing counselling services within the Diocese.	1	Records relating to correspondence and referrals.	Dossier files	Permanent	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	3	Medical & Moral Scope: The activity of involvement by the Church in social medical and moral issues.	1	Records relating to social issues upon which the Archdiocese has a position. These records show the changes in stance through time and illustrate the church in society. Includes issues such as euthanasia, domestic violence, gambling, homosexuality, prostitution. <i>NB: For records relating to advice provided on request to the government, see GOVERNMENT RELATIONS - Liaison.</i>	Dossier files for individual Agencies	Permanent	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	3	Medical & Moral Scope: The activity of involvement by the Church in social medical and moral issues.	2	Administrative and routine correspondence relating to social issues upon which the Archdiocese has a position		Temporary - Retain 5 years after last action	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	4	Welfare Scope: The activity of managing social wellbeing through agencies such as Centacare, St Vincent de Paul; Moore Street Day Centre, Katherine House, Diocesan Aids Council.	1	Records relating to welfare issues upon which the Archdiocese has a position. These records show the changes in stance through time and illustrate the church in society. Includes issues such as euthanasia, domestic violence, gambling, homosexuality, prostitution. <i>NB: For records relating to advice provided on request to the government, see GOVERNMENT RELATIONS - Liaison.</i>	Dossier files	Permanent	Archdiocese
18	SOCIAL & WELFARE SERVICES Scope: The function of providing social and welfare services.	4	Welfare Scope: The activity of managing social wellbeing through agencies such as Centacare, St Vincent de Paul; Moore Street Day Centre, Catherine House, Diocesan Aids Council.	2	Administrative and routine correspondence with the Agencies		Temporary - Retain 5 years after last action	Archdiocese

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	1	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	1	Records relating to councils and committees initiated by the Archdiocese.	Terms of reference, constitution, agenda, minutes, reports	Permanent	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	1	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	2	Records relating to Archdiocesan representation on external committees.	Nomination, notification, recommendation.	Temporary - Retain 6 years after last action	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	1	Councils and Committees Scope: The activity of the management of councils, committees, secretariats and task forces (both internal and external). Includes the establishment, appointment of members, terms of reference, proceedings, minutes, reports and agenda.	3	Records relating to committees not initiated by the Archdiocese. Includes documents relating to meeting arrangements.	Agenda, reports, minutes, notices of meetings, bookings.	Temporary - Retain 2 years after last action	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	2	Legal Matters Scope: The processes and activities involved in managing legal matters, such as the drawing up of legal arrangements as well as compliance with legal and fiscal requirements for [for example] common seal of incorporation, trusts etc	1	Records related to management of constitutional arrangements, legal and governance matters	Constitutions, Formal Agreements, records of property and land transactions, formal Deeds, incorporation of Trusts	Permanent	Archdiocese
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	3	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	1	Records relating to non-committee based meetings, which focus on the core functions of the agency and highlight changes to structure and operations; or issues affecting staff or volunteer relationships; or issues affecting the agency relationship to the public and/or its clients.		Permanent	GDS15

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19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	3	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	2	Records relating to non-committee based meetings held for routine or general administrative purposes.		Temporary - Retain 5 years after last action	GDS15
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	3	Meetings Scope: The activities associated with gatherings held to formulate, discuss, update, or resolve issues and matters pertaining to the management of the agency, department, or organisation as a whole. Includes arrangements, agenda, taking of minutes etc.	3	Records relating to administrative arrangements for meetings.		Temporary - Retain 2 years after last action	GDS15
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	4	Pastoral Planning Scope: The activity of planning and formulating objectives which support the ongoing life and development of the archdiocese. Includes amalgamating and/or rationalising parishes and services.	1	Records relating to meetings and discussions, negotiations and submissions concerning proposals and plans to amalgamate or alter parishes.		Permanent	Archdiocese
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	5	Performance Management Scope: The process of identifying, evaluation, and developing corporate and employee work performance so that the Archdiocesan goals and objectives are achieved and also benefiting employees through recognition, performance feedback, catering for work needs and offering career guidance.	1	Records relating to summary reporting of Archdiocese performance management systems and training and development analysis.		Permanent - GDS15 has Temporary - Retain 5 years after last action	GDS15
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	5	Performance Management Scope: The process of identifying, evaluation, and developing corporate and employee work performance so that the Archdiocesan goals and objectives are achieved and also benefiting employees through recognition, performance feedback, catering for work needs and offering career guidance.	2	Records relating to the implementation of performance management programs in the agency.		Temporary - Retain 5 years after last action	GDS15

ID	KEYWORDS	ID	ACTIVITIES	ID	RECORD SERIES	RECORD EXAMPLES	RETENTION	SOURCE
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	6	Planning Scope: The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	1	Records relating to master copies of approved, Archdiocesan-wide business, corporate strategic plans and policies. Includes revisions.	Master copies of proposal adopted, consultation papers, final reports, master copies of policy circulars, register of policies, policy manual.	Permanent	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	6	Planning Scope: The process of formulating ways in which objectives can be achieved. Includes determination of services, needs and solutions to those needs.	2	Records relating to the development of Archdiocesan-wide business, strategic or corporate plans and policies.	Working copies and drafts of plans and policies.	Temporary - Retain 5 years after last action	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	7	Policy Scope: The activities associated with developing and establishing decisions, directions and precedents which act as a reference for future decision making, as the basis from which the Archdiocese's operating procedures are determined.	1	Records relating to developing and establishing decisions, directions and precedents which act as a reference for future decision making.		Permanent	GDS 15
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	8	Procedures Scope: The activity of establishing methods of operating laid down by the Archdiocese according to formulated policy.	1	Administrative procedures		Temporary - Retain 2 years after superseded	GDS20
19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	9	Risk Management Scope: The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	1	Risk management plans and implemented disaster plans. Includes post-disaster documentation.	Plans, record of actions, vital records plan.	Permanent	GDS20

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19	STRATEGIC MANAGEMENT Scope: The function of applying broad systematic management planning for the Archdiocese. Includes the activities involved with the development, monitoring, and reviewing of business plans, strategic plans, work plans, corporate plans.	9	Risk Management Scope: The process involving the identification of risks, and the implementation of appropriate practices and procedures which will reduce wastage and the impact of economic loss arising from an incident.	2	Records relating to the development of risk management and disaster plans including plans for protection and re-establishment in case of a disaster. Includes the development of disclaimers.		Temporary - Retain 5 years after last action	GDS20