

National and Heritage Trusts Retention and Disposal Schedule

Responsible public authority: Department of Environment and Heritage Protection

Queensland Disposal Authority Number (QDAN)	707	Version	1
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Scope of retention and disposal schedule

This schedule covers records created by national and heritage trusts, such as the National Trust of Queensland and the Board of Trustees of the Newstead House Trust. The trusts are responsible for the management and conservation of national and heritage trust properties, including promoting the care and appreciation of Queensland's diverse heritage through programs of education, conservation and advocacy.

This schedule is to be used in conjunction with the [General Retention and Disposal Schedule for Administrative Records](#) (GRDS).

References to repealed legislation within this schedule may be taken to be a reference to current legislation if the context permits.

The Department of Environment and Heritage Protection is the responsible agency for the National Trust of Queensland and the Board of Trustees of the Newstead House Trust at the time of approval of the schedule. However, in the event of an administrative change, or the transfer of a function from one public authority to another, this retention and disposal schedule will continue to apply to the records covered by the schedule. For further advice on the currency of approved retention and disposal schedules following administrative change, please contact Agency Services at Queensland State Archives on (07) 3131 7777.

Record Formats

This schedule applies to records created in all formats, unless otherwise specified in the class description. This includes, but is not limited to, records in business systems, maps, plans, photographs, motion picture and records created using web 2.0 media.

Queensland State Archives

Department of Science, Information Technology, Innovation and the Arts



Authority

Authorisation for the disposal of public records is given under s.26 of the *Public Records Act 2002* (the Act).

No further authorisation is required from the State Archivist for records disposed of under this schedule. However, the disposal of all public records must be endorsed by the public authority's Chief Executive Officer, or authorised delegate, in accordance with *Information Standard 31: Retention and Disposal of Public Records*, and recorded in the public authority's disposal log.

Public records that are not covered by an approved retention and disposal schedule cannot be disposed of by a public authority.

Disposal of public records not covered by an approved retention and disposal schedule is a contravention of s.13 of the Act.

Revocation of previously issued disposal authorities

Public records sentenced under revoked retention and disposal schedules should be re-sentenced prior to disposal.

For further advice on the currency of approved retention and disposal schedules, please contact Agency Services at Queensland State Archives on (07) 3131777.

Retention of records

All of the retention periods in this schedule are the minimum period for which the sentenced records must be maintained. Public records cannot be disposed of prior to the expiration of the appropriate retention period. However, there is no requirement for public records to be destroyed at the expiration of a minimum retention period.

Public records must be retained for longer if:

- i. the public record is or may be needed in evidence in a judicial proceeding, including any reasonably possible judicial proceeding
- ii. the public records may be obtained by a party to litigation under the relevant Rules of Court, whether or not the State is a party to that litigation
- iii. the public record must be retained pursuant to the *Evidence Act 1977*
- iv. there is a current disposal freeze in relation to the public record, or
- v. there is any other law or policy requiring that the public record be retained.

This list is not exhaustive.

Public records which deal with the financial, legal or proprietary rights of the State of Queensland or a State related Body or Agency regarding another legal entity and any public record which relates to the financial, legal or proprietary rights of a party other than the State are potentially within the category of public records to which particular care should be given prior to disposal.

Records which are subject to a Right to Information application are to be retained for the period specified in section 8 – INFORMATION MANAGEMENT of the *General Retention and Disposal Schedule for Administrative Records* in addition to their required retention period according to an approved retention and disposal schedule. The two periods run concurrently, and may result in a longer required retention period overall. This is in order to cover all appeal and review processes. Even though the records subject to an application may be ready for disposal according to an approved retention and disposal schedule at the time of the Right to Information application, the additional Right to Information retention requirements must still be applied. See section 8 –

INFORMATION MANAGEMENT of the *General Retention and Disposal Schedule for Administrative Records* for records of Right to Information applications.

The disposal of public records should be documented in accordance with the requirements of *Information Standard 31: Retention and Disposal of Public Records*.

For further advice on the retention and disposal of public records under an approved retention and disposal schedule, please refer to the Queensland State Archives website or contact Agency Services at Queensland State Archives on (07) 3131 7777.

Records created before 1950

Records described in QDAN707v1 that were created before 1950 should be referred to Queensland State Archives for further appraisal before any disposal action is taken by the public authority. For further advice please refer to the Public Records Brief: *Pre-1950s public records* which is available from the Queensland State Archives' website.

Transfer of public records to Queensland State Archives

Records covered by a class with the disposal action of 'Retain permanently' should be transferred to Queensland State Archives with the approval of the State Archivist. Records covered by a class with the disposal action of 'Retain permanently by the Department of Environment and Heritage Protection' are not eligible for transfer to Queensland State Archives unless re-appraised and assigned a disposal action of 'Retain permanently'.

Agencies are required to submit a transfer proposal containing details of the records under consideration for transfer. Queensland State Archives will assess the transfer proposal before formal approval to transfer is issued. Please refer to the Guideline on *Transferring Public Records to Queensland State Archives* available from the Queensland State Archives' website. The State Archivist reserves the right to revise any previous decisions made with regard to the appraisal and transfer of records. Contact Agency Services at Queensland State Archives on (07) 3131 7777 for further details.

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1. National and Heritage Trusts

The function of promoting the care and appreciation of Queensland's diverse heritage through education programs, conservation, interpretation and advocacy, which gives consideration to natural, Aboriginal and Torres Strait Islanders and historic heritage as well as moveable and maritime heritage. Also includes the management and conservation of heritage listed properties, such as Newstead House, and properties of the National Trust, which includes the Currumbin Wildlife Sanctuary.

Reference	Description of records	Status	Disposal action
1.1	<p>EDUCATION PROGRAMS</p> <p><i>The activity of developing and/or facilitating public education programs, such as lectures, tours, activities, resources and school programs, including curriculum based programs to raise awareness, understanding and commitment to Queensland's heritage.</i></p>		
1.1.1	<p>Programs and resources</p> <p>Records relating to education programs and resources developed and/or facilitated by a national or heritage trust aimed at increasing the understanding and enhancement of heritage and conservation.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • program plans • school booking forms • marketing materials • attendee lists • reports. 	Temporary	Retain for 7 years after last action.
1.2	<p>GOVERNANCE</p> <p><i>The activity of governing national and heritage trusts of Queensland responsible for managing and controlling national and heritage listed properties and promoting the care and appreciation of Queensland's heritage. Includes the establishment of trust funds.</i></p> <p><i>See the General Retention and Disposal Schedule for Administrative Records for records relating to the establishment and management of trusts.</i></p>		
1.2.1	<p>Council and board meetings – agendas and minutes</p> <p>Master set of agendas and minutes of council and board meetings which may include, but are not limited to:</p>	Permanent	Retain permanently.

Reference	Description of records	Status	Disposal action
	<ul style="list-style-type: none"> • National Trust of Queensland council meetings • Board of Currumbin Wildlife Sanctuary meetings • Board of Trustees of the Newstead House Trust meetings • branch committee meetings • annual general meetings. <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • agendas • minutes • agenda submissions • submitted reports. <p><i>See the <u>General Retention and Disposal Schedule for Administrative Records</u> for records relating to the administrative arrangements of meetings, appointment of members to committees, boards and councils, and for other internal working groups, such as the Advocacy and Heritage Register Working Group and the Newstead House Advisory Panel.</i></p>		
1.2.2	<p>Membership of the Trust</p> <p>Roll of members.</p> <p>Includes the names and contact information of all persons admitted to membership of the Trust.</p> <p><i>See reference number <u>1.2.3</u> for records relating to the administration of memberships.</i></p>	Temporary	Retain for 7 years after last action.
1.2.3	<p>Membership of the Trust - administration</p> <p>Records relating to the management of memberships of the Trust.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • membership application and renewal forms • change of details • membership subscriptions • life membership nominations. 	Temporary	Retain for 3 years after last action.
1.3	<p>HERITAGE AWARDS</p> <p><i>The activity of establishing the Queensland heritage awards for achievements in identifying, conserving and promoting Queensland's cultural</i></p>		

Reference	Description of records	Status	Disposal action
	<p><i>heritage.</i></p> <p>See the <i>General Retention and Disposal Schedule for Administrative Records</i> for records relating to the administration of the heritage award, such as catering arrangements, invitations and managing heritage award events.</p>		
1.3.1	<p>Award establishment and recipients</p> <p>Records relating to the recipients of a Queensland heritage award including the establishment, rules and conditions of the awards.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • successful nominations • award certificates • award recipients list. <p>See reference number <u>1.3.2</u> for records relating to award determinations and unsuccessful nominations.</p> <p>See the <i>General Retention and Disposal Schedule for Administrative Records</i> for records relating to the administration of the heritage award, such as catering arrangements, invitations and managing heritage award events.</p>	Permanent	Retain permanently.
1.3.2	<p>Award recipients – determination and nominations</p> <p>Records relating to the nominations of recipients of a Queensland heritage award, including the judging of the nominations.</p> <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • unsuccessful nominations • panel notes and reports. <p>See reference number <u>1.3.1</u> for records relating to the establishment of a heritage award and award recipients.</p>	Temporary	Retain for 7 years after last action.
1.4	<p>HERITAGE CONSERVATION</p> <p><i>The activity of rescuing, conserving and presenting heritage properties for the community.</i></p> <p>See section <u>1.5</u> for records relating to the management, conservation and ongoing maintenance of heritage listed properties owned or leased by a trust.</p> <p>See reference number <u>1.5.1</u> for records relating to grants received for heritage listed properties owned or leased by a trust.</p>		

Reference	Description of records	Status	Disposal action
	<p><i>See the General Retention and Disposal Schedule for Administrative Records for records relating to gifts, bequests and donations, and grants not received for the ongoing maintenance and conservation of a heritage listed property</i></p>		
1.4.1	<p><i>Heritage and collection registers</i> Register of National Trust of Queensland which contains individual buildings, precincts, natural environment places and culturally significant artefacts. Also includes the register of significant trees and collection registers. <i>See reference number 1.4.4 for records relating to submissions to the register.</i></p>	Permanent	Retain permanently.
1.4.2	<p><i>Heritage advocacy – campaigns and significant projects</i> Records relating to advocacy campaigns and significant projects, including research projects, managed by national or heritage trusts which highlight the value of heritage places and the risks presented to them over time. Advocacy campaigns may include, but are not limited to:</p> <ul style="list-style-type: none"> • heritage watch campaign for heritage places under threat • lost heritage campaign. <p>Significant projects may include, but are not limited to, those that:</p> <ul style="list-style-type: none"> • result in changes and/or have major impact on the management of property and/or object of national or heritage value • result in major public interest or controversy • result in changes to policy and/or legislation. <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • terms of agreement • partnership agreements • project reports. <p><i>See reference number 1.4.3 for records relating to other research projects.</i> <i>See the General Retention and Disposal Schedule for Administrative Records for records relating to other campaigns that are not advocacy campaigns (such as sales and marketing), festivals and events, and court appeals.</i></p>	Permanent	Retain permanently.

Reference	Description of records	Status	Disposal action
1.4.3	<p><i>Heritage advocacy – projects other</i> Records relating to projects, including research projects, managed by national or heritage trusts which are not covered under 1.4.2.</p> <p><i>See reference number 1.4.2 for records relating to advocacy campaigns and significant projects.</i></p>	Temporary	Retain for 10 years after completion of project.
1.4.4	<p><i>Heritage advocacy - submissions</i> Records relating to successful submissions made by or to a national or heritage trust on:</p> <ul style="list-style-type: none"> • nomination of property to the National Trust of Queensland register • nomination of property to the Queensland heritage register and local heritage registers • nomination of property to national or international heritage lists • local government planning schemes and development applications. <p>Includes objections.</p> <p><i>See reference number 1.4.5 for records relating to unsuccessful submissions.</i> <i>See reference number 1.4.1 for the heritage register.</i></p>	Permanent	Retain permanently.
1.4.5	<p><i>Heritage advocacy – unsuccessful submissions</i> Records relating to unsuccessful submissions made by or to a national or heritage trust.</p> <p><i>See reference number 1.4.4 for records relating to successful submissions.</i></p>	Temporary	Retain for 2 years after last action.
1.4.6	<p><i>Heritage conservation appeals</i> Records relating to public appeals to promote the conservation of Queensland's heritage places.</p> <p><i>See the General Retention and Disposal Schedule for Administrative Records for donations and financial records relating to the appeals.</i></p>	Temporary	Retain for 7 years after completion of appeal.
1.5	<p>PROPERTY PRESERVATION AND MANAGEMENT <i>The activity of managing, controlling and conserving properties owned or operated within Queensland by Trusts, such as the National Trust of</i></p>		

Reference	Description of records	Status	Disposal action
	<p><i>Queensland and the Board of Trustees of Newstead House.</i></p> <p><i>See the <u>General Retention and Disposal Schedule for Administrative Records</u> for donations of artefacts.</i></p>		
1.5.1	<p><i>National and heritage listed properties – management and conservation</i></p> <p>Records relating to the management, maintenance and conservation works undertaken on national or heritage listed property owned or leased by a trust of Queensland. Includes all grants received for these properties.</p> <p>Also includes records relating to:</p> <ul style="list-style-type: none"> • the benefactor/s and/or previous owners of the properties • properties that are no longer owned by a trust • acquisition and disposal of land. <p>Records may include, but are not limited to:</p> <ul style="list-style-type: none"> • conservation reports and logs • leases • property valuations • tenancy agreements • photographic images • specifications and drawings • soil and land surveys • conservation reports and studies. <p><i>See reference number <u>1.4.5</u> for records relating to heritage conservation appeals.</i></p> <p><i>See reference number <u>1.4.4</u> for records relating to submissions for property to be a heritage trust property.</i></p> <p><i>See reference number <u>1.5.2</u> for records relating to the administrative operation of the property.</i></p> <p><i>See the <u>General Retention and Disposal Schedule for Administrative Records</u> for records relating to grants that do not relate to listed heritage trust properties, and legal claims and actions regarding heritage trust listed properties.</i></p>	Permanent	Retain permanently.

Reference	Description of records	Status	Disposal action
1.5.2	<p><i>National and heritage listed properties - operations</i> Non-financial records relating to the administrative operation of a national or heritage listed property. Records may include, but are not limited to:</p> <ul style="list-style-type: none">• operation reports• admission logs• visitor statistics• inventory collection logs• access and entry fees arrangements• tickets• plant and equipment maintenance logs. <p>See <u><i>General Retention and Disposal Schedule for Administrative Records</i></u> for financial records, meetings, stocktake etc.</p>	Temporary	Retain for 10 years after last action.