**CLUB [INSERT CLUB/ BRANCH]**

**Policy Number**

**[insert policy]##**

**INSERT DATE**

**Policy Statement**

**ARCHIVE POLICY**

The following Policy statement was adopted at the Executive Committee meeting held on xx/xx/xxxx and adopted as Branch/ Club Policy from xx/xx/xxxx

1. **INTRODUCTION**

This policy provides a guide for office bearers and staff of [INSERT CLUB/BRANCH] regarding the process relating to archiving of documents.

1. **AIM**

This policy aims to

* Clarify [INSERT CLUB/BRANCH] position relating to the archiving of documents
* Clarify the process of archiving documents
* Assist the Branch is ensuring all necessary documents are archived in a safe and secure manner

1. **BACKGROUND**

* The very nature of surf life saving ensures that we generate and are required to keep a large amount of documentation including but not limited to
  + Workcover Claims
  + Patrol Logs
  + RTO Paperwork
  + Minutes
  + Annual Reports
  + Financial Documentation
  + Marshalling Sheets
  + Awards
* Archiving has traditionally been done as determined by the current [INSERT CLUB/BRANCH] Administrator and/or Manager.

1. **PROCESS FOR ARCHIVING DOCUMENTS**
   * At the end of each season, documents need to be archived appropriately.
   * All archives are stored in [INSERT WHERE CLUB STORES]
   * Colour codes are to be used on the labelling of the archives to ensure that they are stored correctly and can be accessed easily
   * A label is to be attached to each archive box, completed and signed by the staff members responsible for the archiving. This label can be found [INSERT WHERE SAVED]
   * The following is a guide in relation to the archiving of essential documents

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ITEM** | **WHEN** | **WHERE** | **COLOUR CODE** | **TIME ARCHIVED** |
| **ADMINISTRATION** | | |  |  |
| Workcover Claims | 01st July in any one year | Archive Box |  | Indefinitely |
| Judicial Documents | 01st July in any one year | Archive Box |  | Indefinitely |
| Affiliation/DES Reports | 31st July in any one year | Archive Box |  | Indefinitely |
| Club Correspondence | 31st July in any one year | Archive Box |  | 7 Years |
| Minutes | 31st July in any one year | Archive Box |  | Indefinitely |
| Annual Reports \* | After Audit |  |  | Indefinitely |
| **LIFE SAVING** | | |  |  |
| Patrol Logs | 31st May in any one year | Archive Box |  | Indefinitely |
| Incident Reports/ Breaches | 31st May in any one year | Archive Box |  | Indefinitely |
| RTO Paperwork | 30th April in any one year | Archive Box |  | Indefinitely |
| Awards | May 01st in any year | Filing Cabinet |  | Indefinitely |
| **FINANCIAL** | | |  |  |
| Financial Records | After Audit in any year | Archive Box |  | 7 years |
| **SURF SPORTS** | | |  |  |
| Marshall Sheets | April 30th in any one year | Archive Box |  | 7 years |
| Officials Sign Ons | April 30th in any one year | Archive Box |  | Indefinitely |

1. **PROCESS FOR DESTROYING DOCUMENTS**

* Each archives document will showcase a destruction date. No documents are to be destroyed prior to this date.
* On the date listed personnel are able to destroy the documents. Noting that these are to be shredded and placed in the recycling box for destruction.

1. **CONSEQUENCES**

* Incorrect archiving may result in the loss or damage of essential documents
* Historical records may not be available for award and member recognition

1. **CONCLUSION**

This policy is a Branch Policy and as such all Branch Office Bearers and personnel involved in archiving must adhere to this as part of their responsibility towards the Branch

This policy is to be bought to the attention of all personnel for strict compliance

**NOTES**

Colour Code for Archiving System

|  |  |
| --- | --- |
|  | Administration |
|  | Life Saving |
|  | Financial |
|  | Surf Sports |
|  | Miscellaneous |