

Sample Folder/Container Records Structure – for Congregations not using the Synod SharePoint/EDRMS environment

If your congregation chooses not to use the Synod’s filing system, below is a table to help you arrange the saving of your documents. Saving them in this order will help your files be transferred easily to the Synod system, if this is necessary for any reason at some point in future.

Top Folder/Container	Description	Sub folder/s 1	Sub folder/s 2	Sub folder/s 3
Cemetery Management	Relates to the provision of administrative and support functions associated with managing Cemeteries	Cemetery Name	Year	
Congregation Governance	Relates to the strategic and operational management of the Congregation. Use <i>Financial Management</i> for finance matters and <i>Meetings</i> for meeting management and attendance	Attendance Lists	Year	
		Audits	Year	
		Correspondence Register	Year	
		Directory	Year	
		Planning	Year	
		Records Management	Year	
		Reporting	Year	
Events Management	Relates to the management or delivery of events either held by the Congregation or where Congregation employees are invited to attend	Event Name	Year	
External Relations	Relates to the management of the relationship between the Congregation and external entities	Ministers Association	Year	
		Uniting	Year	
Financial Management	Relates to the internal management of financial resources. Includes accounting, budgeting and procurement matters	Banking	Financial Year	
		Budgeting	Financial Year	
		Community Assistance	Financial Year	
		Grants Management	Financial Year	
		Insurance	Financial Year	
		Investments	Financial Year	

		Offerings	Financial Year	
		Payments	Financial Year	
		Petty Cash	Financial Year	
		Presbytery Contributions	Financial Year	
		Procurement	Financial Year	
		Proceeds of Sales	Financial Year	
		Reports	Financial Year	
		Salaries and Wages	Financial Year	
		Taxation	Financial Year	
		Treasurer Working Papers	Financial Year	
Meetings	Relates to the management of or attendance at meetings relating to Congregation matters	Meeting Name	Meeting date e.g. 18 August 2021	Agenda
				Elections
				Minutes
				Papers
				Terms of Reference
Personnel	Relates to the general management of personnel matters for the Congregation. Includes leave and attendance, employment conditions and recruitment activities	Authorisations & Delegations		
		Employment Conditions	Contractor	
			Staff	
			Volunteer	
		Job Descriptions		
		Leave & Attendance		
		Recruitment		
		Working with Children		
Policies and Procedures	Relates to the development and management of policies, procedures, guidelines work instructions and associated rules designed for Congregation operations	Guidelines		
		Manuals or Work Instructions		
		Policy		
		Procedures		
Property Management	Relates to managing land and buildings owned, rented or leased by or to the Congregation	Contact Management	Property Name	Year
		Inspections	Property Name	Year
		Leasing Out	Property Name	Year

		Maintenance	Property Name	Year
		Reports		Year
		Security	Property Name	Year
Publications	Concerns the planning, production, printing, marketing and distribution of publications. Includes digital publications	Image Library	Year	Newsletter Name e.g.
		Media Management	Year	
		Newsletters and Magazines	Year	Beacon
				Distant Socialising
				Focus
		Website		
Synod and Presbytery	Relates to the administration of the Synod meeting held every 18 months and also Presbytery meetings. Use this library for the submission and receipt of correspondence to the Synod or Presbytery with respect to the Synod or Presbytery meetings	Meeting Name	Meeting Date	Nominations
				Reports
				Representatives
Synod Relations	Relates to the management of the relationship between the Congregation and the Synod. This library holds documents submitted by the Congregation or received by the Congregation in relation to the Synod and is used for the purposes of reference by the Congregation. Use the <i>Synod and Presbytery</i> library for correspondence relating to the Synod or Presbytery meetings	ACOMP	Year	
		Assembly	Year	
		Moderator	Year	
		Synod Office	Year	
		UME	Year	
		UFS	Year	
Technology and Communications	Relates to the development and management of hardware infrastructure, applications and databases, and communication networks	Application Management		
		Hardware and Telephony		
		Network		
Templates	Relates to the development and management of the Congregation's organisational templates. Includes forms used as templates. Use this Library only for the management of clean templates. Populated forms and templates should be saved under the appropriate Library.	Financial		
		Letter Heads		

		Logos		
		Publications		
Training and Development	Concerns the management of all types of learning and development opportunities, and training programs for staff, both internal and external, online and face-to-face. Includes training program development, bookings and arrangements, approval to attend, participant lists and evaluations etc. For user manuals that are really procedure manuals use the <i>Policies and Procedures</i> library	Course Type/Name e.g. <ul style="list-style-type: none"> • Church Council • Lay Presiders • Pastoral Partners • Safe Church 	Year	
Workplace Health and Safety	Concerns the development, implementation and coordination of workplace health and safety initiatives in the Congregation. Includes safety, workplace hygiene, ergonomic, first aid measures, and wellness programs			
Worship Mission and Discipleship	Relates to church services, Christian learning and mission and service activities	Baptism	Year	
		Funerals	Year	
		Meals Provision	Year	
		Scripture	Year	
		Study Groups	Year	
		Sunday School	Year	
		Weddings	Year	
		Worship	Year	Informal Services
				Orders of Service
				Online Services
				Recordings of Services
				Rosters