

# State Records Act 1997

## Operational Records Disposal Schedule

History Trust of South Australia (including predecessor agencies)

RDS 2019/10 Version 01

Effective Date: 11 June 2019 to 11 June 2029

Approved Date: 11 June 2019



History Trust of South Australia (including predecessor agencies)

History Trust of South Australia (including predecessor agencies)

## Table of Contents

Preamble .....	6
Purpose of the Schedule .....	6
Application of the <b>Schedule</b> .....	6
Authorisation by State Records .....	6
Approval .....	6
Disposal of Official Records .....	7
Legislation .....	7
Functions of the Schedule .....	7
Using the Schedule .....	8
Layout .....	8
Retention Period of the Record .....	8
Custody and Transfer of the Record .....	9
Permanent Records .....	9
Temporary Records .....	9
Destruction of Records .....	9
Review .....	10
Context Statement .....	11
Context of the Agency Covered by the Schedule .....	11
History and Background .....	11
Role and Function .....	16
Structure Description .....	19
Predecessor Agencies .....	20
Successor Agencies .....	20
Legislation .....	20
Context of the Records Covered by the Schedule .....	21
Coverage of RDS 2019/10 .....	21
Related Series Affected by RDS 2019/10 .....	21
Complementary Schedules to RDS 2019/10 .....	21
Existing Disposal Schedules Superseded by RDS 2019/10 .....	21
Records Structure .....	21

**History Trust of South Australia (including predecessor agencies)**

Broad Description and Purpose of the Records.....	21
Functions and Activities Documented by the Records.....	22
Arrangement of the Records.....	22
Agency Creating the Records.....	23
Agency Owning or Controlling the Records.....	23
Date Range of the Records.....	23
Volume of the Records.....	24
There are approximately 400 linear metres of records across the four sites, including: .....	24
Special Custody Requirements.....	24
Special Storage Requirements.....	24
Issues Not Mentioned Previously.....	24
Comments Regarding Disposal Recommendations.....	24
Permanent Records Rationale.....	24
Temporary Records Rationale.....	25
Other Disposal Considerations.....	25
Disposal Recommendation Effect on Related Records.....	25
Alternative Record Formats.....	26
Impact on Native Title Claims.....	26
Indigenous Considerations.....	26
Scope Note.....	26
Records Covered by this Schedule.....	26
How to Apply this Schedule.....	27
Use in conjunction with GDS.....	27
Use in conjunction with, or complementary to, other RDS.....	27
Other RDS superseded by RDS 2019/10.....	27
Re-sentencing of records where schedules are superseded or particular entries within a schedule are superseded.....	27
Records excluded from RDS 2019/10.....	27
Application to records in all formats.....	27
Interpretation of the Schedule.....	28
Minimum retention periods.....	28
Acronyms.....	28
Definitions of terms specific to RDS 2019/10.....	28

**History Trust of South Australia (including predecessor agencies)**

Legal Deposit .....	28
Records and Litigation.....	29
Pre-1901 Records .....	29
List of Functions and Activities.....	30
Collection Management.....	31
Accessioning and Deaccessioning .....	31
Borrowing and Lending .....	31
Collection Preservation .....	32
Compliance.....	32
Research .....	32
Curatorial Services .....	34
Advice .....	34
Curatorial Assistance.....	34
Museum Accreditation .....	35
Funds Management .....	36
Community Grants .....	36
Income Generation .....	36
Outreach and Standards Program.....	38
Programs and Services .....	38
Exhibiting .....	39

State Records' Contact Information

History Trust of South Australia (including predecessor agencies)

## Contact details

Level 17, 45 Pirie Street

ADELAIDE SA 5000

GPO Box 464

ADELAIDE SA 5000

**Tel** (+61 8) 8204 8786

**Email** [staterecords@sa.gov.au](mailto:staterecords@sa.gov.au)

**Web** [www.archives.sa.gov.au](http://www.archives.sa.gov.au)

© 2019 - 2029 Government of South Australia

This Disposal Schedule may be copied for use by South Australian Government Agencies and Local Government Authorities and for reasonable study or research purposes. No part of this Disposal Schedule may be reproduced or distributed for profit or gain or for any other purpose without the written permission of the Manager [Director] of State Records of South Australia.

The Terms and Scope Notes in the Schedule Body may include terms and relationships that have been taken from Keyword AAA: A Thesaurus of General Terms (© State Records Authority of New South Wales, 1995 and 1998), and are reproduced under a licence agreement between State Records of South Australia and the State Records Authority of New South Wales.

History Trust of South Australia (including predecessor agencies)

# Preamble

## Purpose of the Schedule

This Operational Records Disposal Schedule (RDS) authorises arrangements for the retention or destruction of records in accordance with Section 23(2) of the *State Records Act 1997*.

## Application of the Schedule

**History Trust of South Australia (including subordinate agencies and their predecessor agencies)**

**Approved Date: 11 June 2019**

**Effective Date: 11 June 2019 to 11 June 2029**

## Authorisation by State Records

This authorisation applies only to the disposal of the records described in the Schedule.

## Approval

In accordance with section 23 of the *State Records Act 1997*, this RDS constitutes a determination by the Director, State Records, with the approval of State Records Council, at their meeting held on 11 June 2019.

History Trust of South Australia (including predecessor agencies)

# Disposal of Official Records

## Legislation

Section 23(1) of the *State Records Act 1997* states that an agency must not dispose of official records except in accordance with a determination made by the Manager [Director] of State Records with the approval of the State Records Council.

Section 23(2) states:

‘If an agency requests the Manager to make a determination as to the disposal of official records, the Manager must, as soon as practicable:

- (a) with the approval of the [State Records] Council, make a determination requiring or authorising disposal of the records in a specified manner; or
- (b) make a determination requiring delivery of the records into the custody of State Records or retention of the records and later delivery into the custody of State Records.’

The contents of an RDS, once the approval process is complete, constitute a determination within the meaning of the *State Records Act 1997*.

## Functions of the Schedule

An RDS plans the life of these records from the time of their creation to their disposal. It describes the records created and/or controlled by The History Trust of South Australia the disposal sentence specifying whether they are to be retained as archives or destroyed, and when this should occur.

This Operational Records Disposal Schedule has been prepared in conjunction with staff from The History Trust of South Australia to determine the records which need to be kept because of their long term value and to enable the disposal of records once they are no longer needed for administrative purposes. The assessment of the records takes into account their administrative, legal, evidential, financial, informational and historical values. The appraisal of the records is in accordance with the State Records’ policy as documented in Appraisal of Official Records – Policy and Objectives - available from State Records’ website ([www.archives.sa.gov.au](http://www.archives.sa.gov.au)).

The Schedule complements the General Disposal Schedules (GDS) that are issued by State Records to cover housekeeping and other administrative records common to most State Government agencies.

History Trust of South Australia (including predecessor agencies)

## Using the Schedule

The Schedule applies only to the records described within it.

### Layout

The Schedule is laid out as follows:

**Item Number:** Numbering in the Schedule is multi level:

- Functions have single numbers (e.g. 1.)
- Activities and/or processes have two-level numbers (e.g. 1.1)
- Disposal classes have three-level numbers (e.g. 1.1.1)

**Function:** The general functions are shown in 11 point bold Arial upper case at the start of each section. (e.g. **COLLECTION MANAGEMENT**)

**Activity/Process:** The activities and processes relating to each function are shown in 11 point bold Arial sentence case (e.g. **Collection Preservation**).

**Description:** Descriptions are in three levels ranging from broad functions to specific disposal classes:

- definitions of functions are shown at the start of each section in **bold** (e.g. **The function of making the material heritage of the State available to the community by acquiring, documenting, interpreting and preserving objects.**)
- definitions of activities are located adjacent to the activity title in *italics* e.g. *The activity of preserving and conserving objects in the collection;* and
- descriptions of each disposal class are arranged in sequence under the activity definitions.

**Disposal Action:** Disposal actions relate to the disposal classes arranged under the activity descriptions. The status of the class is either PERMANENT or TEMPORARY with a disposal trigger and retention period given for all temporary records.

### Retention Period of the Record

The Schedule is used to sentence records. Sentencing involves applying the record retention periods within the RDS to the records of The History Trust of South Australia. 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 the minimum requirements and The History Trust of South Australia may extend the retention period of the record if it considers there is an administrative need to do so. Where The History Trust of South Australia wishes to retain records for substantially longer periods, it should request that the Schedule be amended to reflect this requirement.



History Trust of South Australia (including predecessor agencies)

## Custody and Transfer of the Record

### Permanent Records

Section 19 of the *State Records Act 1997* includes provisions for the transfer of custody of an official record:

- a) when the agency ceases to require access to the record for current administrative purposes; or
- b) during the year occurring 15 years after the record came into existence - whichever first occurs.

Official records that have been sentenced as permanent, in accordance with an approved disposal schedule, are required to be transferred to State Records.

Agencies with valid reasons to retain permanent records for longer than 15 years should apply in writing to Director [Manager], State Records requesting either a postponement or an exemption from section 19.

It should be noted that postponement or exemption are only granted in exceptional circumstances.

### Temporary Records

The custody of official records that have been sentenced as temporary is the responsibility of agencies. A policy and standards framework for the management and storage of temporary value official records has been established by State Records as documented in *Records of Temporary Value: Management and Storage: Standard and Guidelines* (May 2002). The History Trust of South Australia needs to comply with these policy documents - available from State Records' website ([www.archives.sa.gov.au](http://www.archives.sa.gov.au)).

The custody of official records on networks or hard drives is also the responsibility of agencies. The History Trust of South Australia needs to ensure that records in electronic format remain accessible to authorised users for the duration of the designated retention period. State Records is, however, currently examining options for the transfer of permanent value electronic records in digital form to its custody.

## Destruction of Records

Prior to destruction, the following General Disposal Schedules (GDS) need to be consulted:

- GDS 16 Impact of Native Title Claims on Disposal of Records to ensure records which are relevant to native title claims in South Australia are identified and preserved;
- GDS 27 for Records Required for Legal Proceedings or Ex Gratia Applications Relating to Alleged Abuse of Former Children Whilst in State Care to ensure the preservation of official records that may relate to the rights and entitlements of the

#### History Trust of South Australia (including predecessor agencies)

individuals who present a court claim or apply for an ex gratia payment and of the State Government in defending or processing those claims and applications; and

- GDS 32 for Records of Relevance to the Royal Commission into Institutional Responses to Child Sexual Abuse to ensure that records of relevance to the Royal Commission are protected and available for the purposes of the Royal Commission and any subsequent actions involving the South Australian Government as well as for future reference and accountability purposes and to protect the rights and entitlements of stakeholders.

The History Trust of South Australia must ensure that all destruction is secure and confidential and that a certificate confirming destruction is provided by private contractors.

Standard methods for destruction of paper are shredding, pulping or other means that are environmentally friendly.

Records in electronic format must only be destroyed by reformatting or rewriting to ensure that the data and any “pointers” in the system are destroyed. “Delete” instructions do not offer adequate security as data may be restored or recovered.

The History Trust of South Australia should keep their own record of all records destroyed, noting the relevant disposal authority. Proof of destruction may be required for legal purposes, or in response to FOI applications. When records are destroyed systems that control them should also be updated by inputting destruction dates and relevant disposal authorities.

## Review

State Records’ disposal schedules apply for a period of ten years. Either The History Trust of South Australia or State Records may propose a review of the Schedule at an earlier time, in the event of changes to functions or procedures that affect the value of the records covered by the disposal authority. Reviews are especially necessary if there is vast administrative change that affects the currency and use of the records and/or the records are dispersed to other agencies.

The State Records Council needs to approve all amendments to the Schedule. Officers using the Schedule should advise State Records of any necessary changes.

History Trust of South Australia (including predecessor agencies)

# Context Statement

## Context of the Agency Covered by the Schedule

### History and Background

#### Development of Museums and Public Culture in Australia

In April 1974, the Australian government established a Committee of Inquiry to consider the renewal of museums and national collections. Its Chair was Peter Pigott<sup>1</sup>, a Sydney businessman who also held positions with the National Parks and Wildlife Foundation. His fellow committee members included luminaries such as Frank Talbot, Director of the Australian Museum, Geoffrey Blainey, Professor of Economic History at the University of Melbourne, R.W. Boswell, Chairman of the Atomic Energy Commission, Mrs Andrew Clayton, Member of the Executive Board of the National Parks and Wildlife Foundation, John Mulvaney, Professor of Pre-History at The Australian National University and D.F. Waterhouse, Chief of the Division of Entomology at CSIRO.

The Federal Whitlam government fell just days after the Pigott Report was tabled, but South Australia had participated in the Inquiry and it became an important stimulus for the development of museums in that State. The social democratic identity epitomised by the 'Dunstan Decade'<sup>2</sup> at this time, led to the State's creation of a set of metropolitan museums and a society which led the nation in historical consciousness<sup>3</sup>.

#### The Edwards Report 1980

The Pigott Report contributed significantly to the policy environment in which the Trust developed. One aspect was the importance of the Museum as an educator. A second aspect was the importance of addressing issues of Australia's European heritage. These two issues were highlighted by Robert Edwards, of the Aboriginal Arts Board of the Australia Council, who was appointed by the South Australian government in 1979 to report on the redevelopment of the South Australian Museum. His brief was widened to the question of the State's historical records and collections and Edwards

---

<sup>1</sup> Anne-Marie Conde: 'The orphans of government': The Committee of Inquiry on Museums and National Collections (The Pigott Report), 1974–75

<sup>2</sup> 1970-1979

<sup>3</sup> Mark Finnane: Museums Study: Draft Report, History Trust of South Australia. 1990

### History Trust of South Australia (including predecessor agencies)

recommended the establishment of a State Historical Centre<sup>4</sup> which would act as a focus for community interest in state history, and undertake functions such as oral history not conducted widely by other institutions<sup>5</sup>. A working party established to consider these suggestions recommended the Centre be managed by a new statutory authority and that it would take responsibility for the Constitutional Museum and possibly the Birdwood Mill Museum.

### The Constitutional Museum Trust 1979 – 1980

In the late 1970s the Old Parliament House adjacent to the Parliament House on North Terrace, was restored to reflect as closely as possible, its 1875 condition and was converted to the Constitutional Museum, Australia's first political museum. The Constitutional Museum opened in 1980 under the *Constitutional Museum Act 1978*. In June of that year, Norman Etherington, a British imperial historian accepted the Chairmanship of the Trust. The Museum's aim was to increase public understanding and awareness of South Australian constitutional, political and government history. Etherington incorporated research staff and a capacity to mount changing displays. Newly graduated historians hired as researchers including the first Director Peter Cahalan were inspired by the vision of a museum where the interpretation of history took precedence over curating artefacts<sup>6</sup>. The Constitutional Museum operated under that name from 1979 and then as Old Parliament House until 1995, when the building reverted to use by the Parliament, largely as offices and committee rooms.

Prior to the Trust's appointment, preliminary work on the Museum was conducted by the Publicity and Design Services Branch of the Premier's Department.<sup>7</sup> The Constitutional Museum Trust responded to Edwards suggestion and proposed a History Trust to address the functions recommended, including heritage, education and public access. In 1980, the Liberal Minister for the Arts, Murray Hill reconstituted the Constitutional Museum Trust as the State History Trust<sup>8</sup>. The early days of the Trust relied for its establishment on seconded staff from government agencies and other museums<sup>9</sup> and operations were conducted both at the State Library's Institute Building on North Terrace, and at the Constitutional Museum.

### History Trust of South Australia (The Trust) 1981 -

Edwards 1980 report<sup>10</sup> laid the foundations for, and facilitated the public discussion and decision making which resulted in the formation of the Trust and its adoption of the

---

<sup>4</sup> Op cit p.3

<sup>5</sup> History Trust of SA Annual Report 1981 p5

<sup>6</sup> Norman Etherington, "History Trust of South Australia" in *The Wakefield Companion to South Australian History*, Edited by Wilfrid Prest with Kerrie Round and Carol Fort

<sup>7</sup> SRSA Archive Search: GA430

<sup>8</sup> Norman Etherington, "History Trust of South Australia" in *The Wakefield Companion to South Australian History*, Edited by Wilfrid Prest with Kerrie Round and Carol Fort

<sup>9</sup> Ibid p6: Mr Brian Samuels (Department of Education), Dr John Tregenza (Art Gallery of SA), and Mr Geoff Speirs (South Australian Museum).

<sup>10</sup> Robert Edwards AO: *Museum Policy and Development in South Australia*. 1981

### **History Trust of South Australia (including predecessor agencies)**

set of objectives Edwards articulated. From the beginning, the Trust emphasised its important service role. It was to be involved not just in the establishment and maintenance of historical museums, but in coordinating and stimulating interest in South Australian history. The addition to the new Board of the History Trust of John Radcliffe who had played a key role in developing the South Australian Tramways Museum ensured that technological history would not be slighted. John Tregenza too, joined the Trust as the first Senior (later State) Historian<sup>11</sup>. Soon, a maritime and a railway museum were added to the Trust's responsibilities. A feature of the organisation was a strong outreach program intended to strengthen local museums and historical societies throughout the state.

First considerations were of the potential transfers to the Trust of the Birdwood Mill Museum, the historic home of Captain Charles Sturt 'The Grange', Schubert's Farm Museum at Monarto, and 'Cummins', former family home of the Morphett family. Of the above, only Schubert's Farm Museum was administered by the Trust from 1982 to 1989 as a museum of farming life. The property had been acquired by the South Australian Government in 1974 as a site for a regional folk museum for the planned city of Monarto. The Monarto Development Commission established Schubert's Farm to preserve the agricultural history of the area to be transformed into the city of Monarto.

Following publication of Edwards report in 1981, plans for museums considered two clusters of historic buildings in the North Terrace precinct – the old Destitute Asylum complex and the Armoury and Police Barracks.

### **Museums Accreditation and Grants Program 1982 –**

Museums which met certain criteria for accreditation would be eligible to apply for support under a new Museum Grants Program announced in 1982, the first of its kind in Australia. This ensured the orderly and consistent establishment of museums throughout the state, ensured critical factors such as public access and implemented standards of curation, conservation, displays and museum networks. In 1982, the Trust's Museums Officer Mr Geoff Speirs, visited some 70 museums throughout the state including remote areas, surveying government-held collections, providing advice and preparing for future workshops.<sup>12</sup> This program evolved into the Community Museums Program.

### **National Motor Museum<sup>13</sup> 1982 -**

The National Motor Museum began as a privately owned collection known as the Birdwood Mill Motor and Folk Museum in 1965. It was housed in the Birdwood Mill, a

---

<sup>11</sup> Norman Etherington, "History Trust of South Australia" in *The Wakefield Companion to South Australian History*, Edited by Wilfrid Prest with Kerrie Round and Carol Fort

<sup>12</sup> Annual Report 1982 p12

<sup>13</sup> Interviews occurred with National Motor Museum staff (2008): Kym Hulme, Divisional Manager, Bruno Davids, Switchboard/Administration, Kathy Edelbauer, Facilities Officer and Allison Russell, Senior Curator; and in 2019: Mick Bolognese and Bruno Davids.

#### **History Trust of South Australia (including predecessor agencies)**

former flour mill on the State Heritage Register. The South Australian Development Corporation (SADC) acquired the museum property and assets in December 1976 on behalf of the Government in order to preserve and enhance the museum as a tourist attraction.

Many exhibits from the defunct Museum of Technology and Applied Science, previously located in the School of Mines, North Terrace, Adelaide, were subsequently incorporated in displays at the Birdwood Mill Museum. A new company, Birdwood Mill Museum Pty Ltd was formed to operate the museum. The shareholders of this company were the Treasurer and the Minister of Works, and the Minister of the Arts was the responsible Minister. The company leased the museum property and assets from the SADC, Mr Dennis Dall of Price Waterhouse was appointed Chairman of the company to oversee commercial operations, and the SADC assumed the role of overseeing the operations of the museum. Arrangements were made for the operating losses of the museum to be funded through grants from the Department of Tourism Recreation and Sport. Between 1976 and 1980, the museum received from the from the Department of Tourism interest free loans of \$105,750 to cover losses, and capital grants of \$250,000 for the construction of a pavilion to house the collection of the National Motor Museum, and a loan from SADC to assist in capital improvements – craft shops and a railway station<sup>14</sup>.

In 1981, following proclamation of the History Trust of South Australia Act, the Trust took over the property and business of the Birdwood Mill Museum Pty Ltd.<sup>15</sup> The acquisition was in accord with the intent of the Cabinet Submission amending the previous Constitutional Museum Act of 1978 which provided for establishment of the History Trust to take over the operations of the Constitutional Museum and the Birdwood Mill Museum.<sup>16</sup>

#### **South Australian Maritime Museum<sup>17</sup> 1983 -**

The South Australian Maritime Museum collects, preserves and interprets the State's maritime history. The Museum was established in 1983 and opened to the public in 1986, celebrating alongside the Migration Museum, the Jubilee Year of European settlement in South Australia in 1836.

The Maritime Museum originally occupied a number of redeveloped commercial buildings and wharf sites. Included in the development of the site was the reconstruction of the old Port Adelaide Lighthouse. The urban renewal context of this

---

<sup>14</sup> SADC Acting Chairman Minute to the Treasurer, 13 May 1980 p.3

<sup>15</sup> Director Department for the Arts Minute to the Commissioner of Corporate Affairs 9 August, 1983

<sup>16</sup> Cabinet Approval 15 December 1980

<sup>17</sup> Earlier interviews (2008) occurred with Brian Roche, Manager, Library Services and Tammy Watson, Records Manager, both of the City of Port Adelaide and Enfield; Interviews (2008) also occurred with South Australian Maritime Museum staff: Kevin Jones – Director, Rebecca Baker, Acting Operations Manager, Kristy Dermody, Curator and Lindl Lawton, Senior Curator; and in 2019: Karen Sellar and Amy Pyatt.



### History Trust of South Australia (including predecessor agencies)

development was evident in the decision to reconstruct the Lighthouse as part of the new Civic Square with the Museum waterfront site at North Parade wharf.

The core of the Museum's collection is a legacy from the Port Adelaide Institute. Established in 1851, the organisation that became the Port Adelaide Institute served as a library and centre for the Port's social and cultural activities for over a century. It also functioned as an educational venue for working class adults who were unable to pay for formal education. In 1872 the Institute established a museum and art gallery. While a source of pride for its committee and members, by 1930 its collections were so vast they had become unmanageable. In 1932, the Institute committee decided to change the museum's focus to Port Adelaide and South Australia's maritime history and collection items that did not reflect this focus were transferred to the South Australian Museum. The collection created by honorary curator Vernon Spottiswood Smith was known as the Port Adelaide Nautical Museum, and was the first of its kind in Australia. It had various sites throughout its history, the last being 135 St Vincent Street, Port Adelaide<sup>18</sup>.

In 1978, the Port Adelaide Institute was dissolved, and the Port Adelaide Council became the custodian of the Port Adelaide Nautical Museum Collection under a Deed of Trust.

The Edwards Report recommended the Maritime Museum remain in Port Adelaide, as part of a cultural facility which would enhance the social and economic reconstruction of the area. The then Department of Urban and Regional Development saw the Museum as enhancing the historic precinct's role as an interpretive centre for the State's heritage and as a tourist centre.<sup>19</sup>

Following the passage of the *History Trust of South Australia Act 1981*, and the subsequent establishment of the Trust, the Port Adelaide Nautical Museum collection passed to the ownership of the State Government. However the Port Adelaide Council Deed of Trust made no provision for a change of Trustee. The Council therefore lent the collection to the Trust of South Australia, with a list of the artefacts comprising the collection, administrative files for managing the collection and the name Port Adelaide Nautical Museum was retained for this collection.<sup>20</sup>

The Council retained a hard copy of the inventory.

In 2005, the requirement to change the Deed of Trust went before the Supreme Court. Council relinquished its responsibility as Trustee and the Trust became the new Trustee of the museum collection in its entirety.

### Migration Museum<sup>21</sup> 1983 -

---

<sup>18</sup>Input provided by Lindle Lawton, Senior Curator, Maritime Museum

<sup>19</sup>Edwards report p.185

<sup>20</sup>Earlier interview (2008) with Brian Roche, Manager Library Services, City of Port Adelaide and Enfield.

<sup>21</sup> Interviews (2008) occurred with Migration Museum staff: Viv Szekeres, Director, Jessamy Benger, Operations Manager and Pamela Graham, Operations Manager; and in 2019: Suzanne Redman.

### History Trust of South Australia (including predecessor agencies)

The Migration and Settlement Museum was established in 1983, with the commitment to develop an ethnic museum as one of its social museums<sup>22</sup>. Planning for the museum involved extensive consultation with South Australian migrant communities and an advisory committee which included representatives of the communities. Its political context and rationale was the 1970s policy development of multiculturalism, and an emphasis history as a process of understanding diversity, conflict and change<sup>23</sup>.

Edwards recommended that the old Destitute Asylum site be shared between an Ethnic Museum, and a Performing Arts Museum<sup>24</sup>. A Working Party was appointed and canvassed ethnic communities who widely supported the proposal. The museum inherited historical relics and weapons from the Art Gallery of South Australia and opened to the public in December 1986. On May 6, 1988, the Migration and Settlement Museum changed its logo and was renamed Migration Museum.

### Amalgamation of the Museums 1984

During 1984, the three new museums were amalgamated into one administrative unit, and the Curator, Migration and Settlement Museum was confirmed as Coordinator, Social History Museums. South Australia at this time had more than 150 museums and the Trust was heavily burdened with proposals and projects. Voluntary groups in communities grew and were welcomed, and the earlier work of Speirs in preparing regional museums and the distribution by the Trust of museum policies helped to rationalise and manage the rise of small museums, often with narrow definitions.

In late 2000 Margaret Anderson, first curator of the Museum of Migration and Settlement succeeded Peter Cahalan as Director of the History Trust.

### Role and Function

The Trust<sup>25</sup> as a statutory authority was established in 1981 under the *History Trust of South Australia Act 1981* to encourage the research and public presentation of South Australian history and to safeguard South Australia's material heritage. The Trust's central administration – the Office of the CEO - including its Public Programs, is located at the Torrens Parade Ground in central Adelaide, but its main public face is presented by three history museums – the Migration Museum, National Motor Museum and South Australian Maritime Museum – and the Centre of Democracy gallery. Changing exhibitions are sometimes also presented in the Trust's Exhibition Gallery at the Parade Ground.

---

<sup>22</sup> Annual Report 1985, p27

<sup>23</sup> Finnane, op cit p8

<sup>24</sup> This Museum was later established at the Adelaide Railway Station.

<sup>25</sup> Earlier interviews (2008) occurred with Trust Directorate staff: Margaret Anderson, Chief Executive, Linda Curran, Records Officer, Rebecca Rudzinski, Business Manager, Anna Ragosa, Secretary to Chief Executive, Kate Walsh, Manager, Community History Unit, Mandy Paul, Senior Curator; and in 2019: Susan Taylor, Records Manager, Donna Tims, Business Manager.



### History Trust of South Australia (including predecessor agencies)

The Trust also manages two public grant programs, to assist community museums and historical researchers. It is also responsible for assessing, accrediting and monitoring community museums against national museum standards.

Occasionally, assistance and advice is sought from the Trust by other government agencies relating to curatorial matters. This occurred for example from the South Australian Housing Trust enquiring about the management of their inventory of memorabilia.

The Trust's Board of eight Trustees reports to the Minister for Education<sup>26</sup>.

### The National Motor Museum

The Museum's main role is to display and interpret Australian road transport history. It has a collection of over 350 vehicles, including cars, motorcycles and commercial vehicles and an extensive research library. The Museum presents a changing exhibition program and works with local, interstate and international vehicle enthusiasts. The grounds of the museum are also used to stage large events.

The Museum has a significant library collection over four levels, of car manuals, guides and parts specifications available to the public. In 2017 a new permanent exhibition was implemented with part sponsorship of Australian motor enthusiast company Shannons. "Reassembled" is a [re]Assembly permanent display above the museum's vast vehicle collection, a full-sized replication of parts of the Elizabeth South Australia assembly line hangs from the ceiling, the shells of five unfinished vehicles frozen in various stages of production and the landmark 50,000th VF Commodore showcased as a completed car.

The National Motor Museum is the only State Government funded Motor Museum in Australia.

### The South Australian Maritime Museum

The Museum comprises a series of historic buildings in Port Adelaide's heritage precinct. It presents exhibitions and public programs in two 1850s bond stores and its Port Adelaide Lighthouse is open as a visitor attraction. The Museum leases out a sail-maker's loft and chandlery as a shop and a café respectively. Its collection of historic objects is held in two stores located off-site<sup>27</sup>.

The Museum presents a program of changing exhibitions, education programs and events for school vacations and attracts an audience of interstate and overseas tourists as well as visitors from rural and urban South Australia. It provides tours of the Port River on its former police launch *Archie Badenoch* and its steam tug *Yelta*.

---

<sup>26</sup> The Act was committed to the Minister of Education under S.5 of the Administrative Arrangements Act 1994 (SA) and gazetted August 30, 2018

<sup>27</sup> Shed 13 at Netley, and Netley 262.

#### **History Trust of South Australia (including predecessor agencies)**

The Museum holds a collection of significant vessels including four built for races by famous yachtsman, James Hardy.

The Museum is supported by an active core of volunteers and by a Development Committee.

#### **The South Australian Migration Museum**

The Migration Museum was the first museum in Australia to focus on the history of immigration and immigrant communities. It presents both permanent and changing exhibitions, educational programs and special events, and cares for a significant collection of objects. The Museum has worked closely with individuals and community groups to achieve its goals.

The Migration Museum is assisted financially by The Migration Museum Foundation, established in 1999 to raise funds. Interest from the finance invested by the Foundation is used to fund additional programs. The Foundation is a separate entity with its own Constitution, Committee and auditing requirements.

#### **Public Programs**

Public Programs are run from the Office of the Chief Executive Officer. Public Programs manages a history resource centre and provides advice and assistance to researchers, historical societies, museums and the general public on South Australian history and historical sources. It conducts a monthly lecture series and regular talks.

#### **Community Programs and Digital Engagement<sup>28</sup>**

The outreach work of the (former) Community History Programs unit has been variously organised and named over the years. In the early 1990s and again in the 2000s it was called the Community History Unit; in the late 1990s it was referred to as the State History Centre. At other times, key staff have worked on their own – e.g. Museum Services Officer, Information Officer and State Historian.

Digital Engagement and the current core history network programs are also managed from the Office of the Chief Executive Officer. This team provides leadership in progressing digital-first aspirations and the development of community-based historical organisations and museums. This team's remit stretches across online services, digital support for exhibitions, collections digitisation, the Museums and Collections (MaC) standards programs, advice and assistance, community partnership projects, and management of two community grant funds.

---

<sup>28</sup> Earlier interviews (2008) with Kate Walsh, Manager, Community History Unit

## History Trust of South Australia (including predecessor agencies)

### Grant Programs

Two community grant programs are also administered. The Museums and Collections Program (formerly Community Museums Program) supports the Statewide network of community history organisations that manage historical collections.

The South Australian History Fund (SAHF) supports research, publications and projects on South Australian history. There is a particular focus on regional South Australia.

### History Festival 2004 -

The Trust presents the Statewide annual community-based event History Festival. The History Festival is one of South Australia's largest community events. The festival promotes South Australia's wonderful collections, places and stories through an amazing range of history-related activities. The History Festival began in 2004 as SA History Week and has grown each year, becoming a month-long festival since 2011. In 2018, a record number of events were presented: 666 events presented by 374 organisers around the state. A new partnership with Elderly Citizens Homes complemented the existing sponsorship agreements with City of Adelaide and SA Power Networks.

### Centre of Democracy 2017 –

The first full year of operations for the Centre of Democracy was conducted in 2018, following its establishment in May 2017. The Centre is an ongoing gallery developed in collaboration with the State Library of South Australia, and located in the historic Institute Building on North Terrace - the centre of the State's major collecting institutions.

The Centre has a permanent exhibition gallery and runs a variety of programs designed to encourage people to explore and participate in our democracy. These include a self-guided walking tour, talks and school programs. Operating across two organisations, the Centre has adopted a partnership approach to programming and audience development.

School visitors are a very important audience segment, and throughout 2018 more than 400 teachers participated in professional development activities. The education team has developed programs in different formats to respond to school needs, including digital programs and onsite learning.

### Structure Description

The Trust is a Statutory Authority with a Board of Trustees, reporting to the Minister for Education. The Trustees at the time of writing are:

- Elizabeth Ho OAM
- Carmel Zollo
- Eva Balan-Vnuk
- Joost Den Hartog

#### History Trust of South Australia (including predecessor agencies)

- June Roache
- Michael Lennon
- Peter Goers OAM
- Professor Peter Monteath

The administration, represented in the organisation chart at *Appendix 1*, includes the following:

- Chief Executive: Greg Mackie OAM
- Director, Maritime Museum: Kevin Jones
- Director, Migration Museum, Research & State History Collection: Mandy Paul
- Director, National Motor Museum: Paul Rees

#### Predecessor Agencies

- GA430 - Constitutional Museum Trust 1978-1981
- GA441 – Monarto Development Commission 1974-1981
- Port Adelaide Institute

#### Successor Agencies

There are no successor agencies.

#### Legislation

Relevant Legislation administered by Agency:

- *History Trust of South Australia Act 1981*
- *History Trust of South Australia Regulations 2010*
- *HTSA (Leasing of Property) Amendment Act 1995*

Relevant Legislation NOT administered by Agency:

- *Australian Maritime and Safety Authority Act 1990*
- *SA Ports (Disposal of Maritime Assets) Regulations 2012*
- *Historic Shipwrecks Act 1981*
- *SA Museum Act Amendment Act 1992*
- *Aboriginal Heritage Act 1979*
- *Rail Safety Act 2007*
- *SA Heritage Act 1978*
- *Carers Recognition Act 2005*
- *Electronic Communications Act 2000*
- *Financial Sector Reform (SA) Act 1999*
- *Freedom of Information Act 1991*
- *Public Finance and Audit Act 1987*
- *Public Sector Act 2009*

**History Trust of South Australia (including predecessor agencies)**

- *Public Sector Regulations 2010*
- *Public Sector (Honesty and Accountability) Act 1995*
- *State Records Act 1997*
- *Electronic Communications Act 2000*
- *Constitutional Museum Act 1978 (repealed)*

## **Context of the Records Covered by the Schedule**

### **Coverage of RDS 2019/10**

This RDS covers the ongoing operational records of the Trust, records of subordinate agencies and their predecessors and some records of the Port Adelaide Institute and Council in relation to the management of the Port Adelaide Nautical Museum (now the Maritime Museum). The records covered by this Schedule range from the 1930s ongoing for current business. The Schedule will provide appropriate disposal authority for current and future records.

The records in this Schedule document the core business functions of the History Trust of South Australia.

### **Related Series Affected by RDS 2019/10**

There are no series affected by this RDS.

### **Complementary Schedules to RDS 2019/10**

There are no existing schedules complementary to this RDS.

### **Existing Disposal Schedules Superseded by RDS 2019/10**

RDS 2008/31 V.1 is superseded by this RDS.

### **Records Structure**

Records are currently stored at all offices of the Trust. Records are captured or indexed in paper and digital formats (RecFind, KE Emu and Cumulus). Record structures follow major activity and subject groupings – eg community relations, conservation, financial management, but differ for each office. These may become functionally standardised across the Trust in the future.

### **Broad Description and Purpose of the Records**

Records in the past have been predominantly paper based files. These are now complemented by digital renditions, born-digital records and cloud-based imaged records. These include object files, correspondence files, copyright clearances, grants programs and working files for exhibitions.

Other records include:

**History Trust of South Australia (including predecessor agencies)**

- Volumes (accession registers)
- Arch folders (loan files)
- Books (indexes)
- Envelopes of loose documents (Object files)
- Photograph folders (Maritime historic photograph collection).

### **Functions and Activities Documented by the Records**

The functions and activities of the Trust were derived from interviews and consultative meetings with staff at their respective offices. Research also occurred across file indexes, Business Plans, Strategic Plan, Annual Report and the agency website.

The Functions and Activities of the Trust are identified as:

- Collection Management
  - Accessioning and Deaccessioning
  - Borrowing and Lending
  - Collection Preservation
  - Compliance
- Curatorial Services
  - Advice
  - Curatorial Assistance
  - Museum Accreditation
- Funds Management
  - Community Grants
  - Income Generation
- Public Programs
  - Education Programs
  - Exhibiting

### **Arrangement of the Records**

The official record comprises the paper-based file at each location and also digital content post implementation of Cumulus. The Office of the Chief Executive Officer (formerly named the Directorate) at Torrens Parade Ground utilises RecFind 6, version 2.9, originally implemented in 1999. Administrative paper-based files are titled hierarchically using the function and activity headings of GDS 30. Files are arranged numerically with the control number comprising year and single number components in ascending sequence, eg. 2008/17. Files prior to the implementation of RecFind also were arranged in year and single number sequence, but in reverse order eg. 17/2008.

#### History Trust of South Australia (including predecessor agencies)

The three museums also have year and single number arrangements of files, including registers of the files, and it is anticipated that they will take up their own RecFind installation during 2019. None of the museums is interfaced. Some older collections at the Maritime Museum are alphabetical arrangements by file title.

Cumulus is a digital asset management system for user management, metadata management, workflows, approvals, email notification, through to a custom user interface. Cumulus is currently being implemented across the Trust to manage large digital files – images, audio and video. Cumulus is integrated with KE Emu.

The Office of the CEO uses RecFind 6, the previous version of which was implemented in 1997. Various databases are being utilised to manage and store records with regular back-up practices in place for each. These include:

- KE Emu – specialty museum software in common use across Australia and by all museums of the Trust. KE Emu manages digital records and stores images, movement and use history relevant to the collections
- MicroSoft Access databases – genealogy and shipping lists
- Inmagic database – library catalogue and also photographs
- FoxPro (legacy) Database of the Digital Engagement team – Foundation database, Settlement Square
- Filemaker.pro V.7 – for event management and record management, National Motor Museum
- Smarty Grants – cloud-based grants administration software

#### Agency Creating the Records

Records created by the Trust including subordinate agencies and their predecessors are administered by them.

#### Agency Owning or Controlling the Records

Records created by the Trust including subordinate agencies and their predecessors are owned and controlled by them.

#### Date Range of the Records

Records Date Range: c1930 to ongoing

Migration Museum: Records of this museums activities and collections date from 1983. However, inventories inherited from the Art Gallery date from the 1930s.

National Motor Museum: Records documenting this museums activities and collections date from c1978.

Maritime Museum: Whilst the objects in the collection date from 1872, records relating to the collection date from the 1930s. Curatorial records relating to the collection began



#### History Trust of South Australia (including predecessor agencies)

in 1985. The earlier Port Adelaide Nautical Museum accession registers were re-compiled in 1972.

### Volume of the Records

There are approximately 400 linear metres of records across the four sites, including:

- The Office of the CEO, Torrens Parade Ground: 165 linear metres including 61 linear metres of inactive records.
- The National Motor Museum: Approximately 120 linear metres on site.
- The Migration Museum: Approximately 40 linear metres on site, including the archive room at the old Police Barracks.
- The Maritime Museum: Approximately 100 linear metres on site.

### Special Custody Requirements

There are no special custody requirements.

### Special Storage Requirements

There are no special storage requirements.

### Issues Not Mentioned Previously

The State History Collection, acting as a 'museum' and items within eg objects, artworks and artefacts are not to be regarded as official records as per 3(1)(c) of the *State Records Act 1997* objects in the State History Collection across the museums and subordinate organisations are not official records.

## Comments Regarding Disposal Recommendations

### Permanent Records Rationale

Records deemed to be permanent are those which have a continuing value to the state or are of national significance.

The records of the Trust which are considered to have ongoing value are considered to meet predominantly State Records Appraisal Objective 4:

*To identify and preserve official records substantially contributing to the knowledge and understanding of the society and communities of South Australia.*

These permanent value records have significant ongoing value to the government and to society, vested in:

- the preservation of objects which have historical and educational value,
- the presentation of South Australian history to the public,
- continuing business value for the Trust,



**History Trust of South Australia (including predecessor agencies)**

- the contribution the information provides to other Agencies' aspects of the collections, and
- longitudinal historical and research information.

Records nominated for permanent retention in this Schedule are:

COLLECTION MANAGEMENT – Accessioning and Deaccessioning (1.1.1 – 1.1.4); Borrowing and Lending (1.2.1); Collection Preservation (1.3.1 – 1.3.2); Compliance (1.4.1 – 1.4.2); Research (1.5.1)

CURATORIAL SERVICES – Advice (2.1.1); Curatorial Assistance (2.2.1); Museum Accreditation (2.3.1)

FUNDS MANAGEMENT – Community Grants (3.1.1 – 3.1.3); Income Generation (3.2.1 – 3.2.2)

OUTREACH AND STANDARDS PROGRAM – Programs and Services (4.1.1 – 4.1.2; 4.1.4 – 4.1.6); Exhibiting (4.2.1 – 4.2.5)

### Temporary Records Rationale

Temporary records are those considered not to have continuing value to the Trust, the State Government nor to society. Records documenting core business activities in this Schedule that are considered of temporary value, have short, or less-than-permanent terms before expiry.

These include:

COLLECTION MANAGEMENT – Research: facilitative records (1.5.2)

CURATORIAL SERVICES – Advice: enquiries about donations, photographs and objects (2.1.2); Curatorial Assistance: contracts for curatorial services (2.2.4)

FUNDS MANAGEMENT – Community Grants: Unsuccessful applications (3.1.4); Income Generation: facilitative arrangements and unsuccessful funding bids (3.2.3)

OUTREACH AND STANDARDS PROGRAM – Programs and Services: delivery of workshops and training programs (4.1.3); Exhibiting: arrangements for storage, workshops and display space (4.2.6); special exhibitions brought in or visiting Trust museums (4.2.7); administrative processes for rotating objects on display (4.2.8); facilitative exhibition activities (4.2.9).

### Other Disposal Considerations

There are no other considerations for or against the retention or destruction of records affected by this RDS.

### Disposal Recommendation Effect on Related Records

There are no related records affected by the disposal recommendations in this RDS.

History Trust of South Australia (including predecessor agencies)

## Alternative Record Formats

Physical formats for records in addition to paper include the following:

- Print and negative photographs and slides
- Audio and video tapes
- Digital film CDs and DVDs.

## Impact on Native Title Claims

There is no discernible relevance to Native Title Claims.

## Indigenous Considerations

The determinations within RDS 2019/10 are consistent with Recommendation 21 of the National Inquiry into the Separation of Aboriginal and Torres Strait Islander Children from Their Families.

The principles outlined in GDS 16, relating to Native Title claims, have also been considered in the development of this Schedule.

RDS 2019/10 meets all cultural, historical, legal and administrative requirements.

All documents considered relevant to native title in South Australia must be checked for actual relevance with the Native Title Section of the Crown Solicitor's Office before being disposed of.

# Scope Note

## Records Covered by this Schedule

This RDS covers the ongoing and historical operational records of the Trust (including subordinate agencies and their predecessors) and some records of the Port Adelaide Institute and Council in relation to the management of the Port Adelaide Nautical Museum (now the Maritime Museum). The records covered by this Schedule range from c1930 to the current date, ongoing for current business. The Schedule will provide appropriate disposal authority for current and future record series.

Records in digital formats must be managed and maintained by migrating and reformatting as required to ensure ongoing accessibility for evidentiary, historical and administrative purposes in accordance with their permanent or temporary disposal status.

History Trust of South Australia (including predecessor agencies)

## How to Apply this Schedule

### Use in conjunction with GDS

This Schedule should be used in conjunction with GDS 30, as amended, or its successor. Cross-references to the GDS 30 are included in this Schedule where appropriate.

To identify records that may be potentially relevant to native title claims, please refer to guideline Identifying documents which may be relevant to Native Title attached to GDS 16. Where records sentenced for temporary retention are identified as having potential relevance to a native title claim, they need to be retained until 31 December 2024.

To identify records that may be potentially relevant to Legal Proceedings or Ex Gratia Applications Relating to Alleged Abuse of Former Children Whilst in State Care, please refer to GDS 27. Where records sentenced for temporary retention are identified as having potential relevance, they need to be retained until 31 December 2020.

To identify records that may be potentially relevant to the Royal Commission into Institutional Responses to Child Sexual Abuse, please refer to GDS 32 and GDS 36. Where records sentenced for temporary retention are identified as having potential relevance, they need to be retained until 31 December 2023.

### Use in conjunction with, or complementary to, other RDS

This Records Disposal Schedule does not complement any existing Records Disposal Schedules.

### Other RDS superseded by RDS 2019/10

This RDS supersedes RDS 2008/13 Version 0001

### Re-sentencing of records where schedules are superseded or particular entries within a schedule are superseded

There is no requirement to re-sentence any records covered by superseded Schedules.

### Records excluded from RDS 2019/10

There are no records excluded from cover by the RDS.

### Application to records in all formats

RDS 2019/10 applies to records in all formats, including databases and other electronic records. The Trust is required to ensure that records remain accessible for the duration of designated retention periods.

History Trust of South Australia (including predecessor agencies)

## Interpretation of the Schedule

### Minimum retention periods

Retention periods for temporary records shown in RDS 2019/10 are minimum retention periods for which records need to be retained. It is at the discretion of the Trust as to whether records are kept for longer than the minimum period.

### Acronyms

- MaC: Museums and Collections
- SAHF: South Australian History Fund

### Definitions of terms specific to RDS 2019/10

- Accessioning: the process of registering and cataloguing an object into the collection
- Artefact: an item (including an object, document, picture, or specimen) accessioned into the collection.
- Conservation: the processes by which objects or the environment in which they are housed are treated in order to conserve, preserve, protect or maintain integrity according to strict principles.
- Curatorial: relating to the management, research and interpretation of the collection.
- Deaccessioning: the process by which objects in the Trust collection are removed from the collection, other documentation is appropriately amended ensuring that legal requirements are met and that the objects are made ready for disposal
- Preservation: the actions taken to retard deterioration of or prevent damage to objects.
- Provenance: the proven or documented place of origin, use, history and ownership of an object.

## Legal Deposit

Legal deposit refers to statutory provisions that oblige publishers to deposit copies of their publications in libraries in the country in which they are published. Under the *Commonwealth Copyright Act 1968* and various Australian state Acts, a copy of any work published in Australia must be deposited with (a) the National Library of Australia and (b) the appropriate State Library. Legal deposit extends not only to commercial publishers but also to private individuals, clubs, churches, societies and organisations.

In South Australia, one copy of publications produced for external use should be deposited with the State Library and the Parliamentary Library (section 35, Libraries Act 1982). Publications include books, newspapers, magazines, journals, pamphlets, maps, plans, charts, printed music, records, cassettes, films, video or audio tapes,

**History Trust of South Australia (including predecessor agencies)**

computer software CD-ROMS, compact discs and other items made available to the public.

## **Records and Litigation**

Where the Trust is aware that records may be required for use in litigation, for use in a government enquiry or the consideration of the Ombudsman, the records must not be destroyed. In such circumstances the records must be retained until two years after all cases and enquiries are complete (including appeals) and then have the original retention period applied to the records.

## **Pre-1901 Records**

All pre-1901 records are required to be retained permanently in accordance with a motion approved by the State Records Council on 19 February 2008.

In this instance, this RDS does not apply to pre-1901 records.

History Trust of South Australia (including predecessor agencies)

# List of Functions and Activities

Collection Management.....	31
Accessioning and Deaccessioning .....	31
Borrowing and Lending .....	31
Collection Preservation .....	32
Compliance.....	32
Research .....	32
Curatorial Services.....	34
Advice .....	34
Curatorial Assistance.....	34
Museum Accreditation .....	35
Funds Management .....	36
Community Grants.....	36
Income Generation .....	36
Outreach and Standards Program.....	38
Programs and Services .....	38
Exhibiting.....	39

History Trust of South Australia (including predecessor agencies)

Item No.	FUNCTION Activity / Process	Description / Disposal Class	Disposal Action
<b>COLLECTION MANAGEMENT</b>			
<b>1</b>	<b>Collection Management</b>	<b>The function of making the material heritage of the State available to the community by acquiring, documenting, interpreting and preserving objects, including digital assets.</b>	
<b>1.1</b>	<b>Accessioning and Deaccessioning</b>	<i>The activity of formally accepting, arranging and describing objects that meet collection criteria into the State History collection; and removing objects that no longer meet the criteria, by donation, exchange, destruction or sale.</i>	
1.1.1	Accessioning and Deaccessioning	Inventories predating the Trust and accession registers compiled since its commencement. Includes master registers, indexes, identifier registrations, provenance, sources, dates and locations, collection history and descriptive information about objects.	<b>PERMANENT</b>
1.1.2	Accessioning and Deaccessioning	Records documenting the acquisition of objects through purchase donation or gift. Includes deeds of gift, bequest and donation. Includes oral histories and personal stories for use in exhibitions, transcriptions of recordings and supporting documentation related to valuations of objects in the collections, or research for provenance.	<b>PERMANENT</b>
1.1.3	Accessioning and Deaccessioning	Records documenting the deaccessioning of collection objects, including agreements, valuations, auction results and reports.	<b>PERMANENT</b>
1.1.4	Accessioning and Deaccessioning	Database records of the collection, including digital images, photographs, and use history.	<b>PERMANENT</b>
<b>1.2</b>	<b>Borrowing and Lending</b>	<i>The activity of borrowing external objects into the Trust collections, and temporarily transferring objects from the Trust's custody. Includes loan agreements.</i>	
1.2.1	Borrowing and Lending	Records documenting the process of incoming and outgoing loans of objects for specific periods. Includes formal loan agreements, transfers of ownership and loan disputes.	<b>TEMPORARY</b>  Destroy 100 years after action completed

History Trust of South Australia (including predecessor agencies)

1.3	<b>Collection Preservation</b>	<i>The activity of preserving and conserving objects in the collection.</i>	
1.3.1	Collection Preservation	Records documenting the preservation and maintenance of collection objects. Includes condition reports, annual Artlab program, conservation schedules and preventative conservation eg pest control and environmental monitoring, and disaster preparedness.	<b>PERMANENT</b>
1.3.2	Collection Preservation	Records documenting the maintenance of the working collections eg vessels in survey and the driven collection of vehicles. Includes work conducted by mechanical and curatorial personnel and out-sourced work.	<b>PERMANENT</b>
1.4	<b>Compliance</b>	<i>The activity associated with complying with mandatory or optional accountability, fiscal, legal, regulatory or quality standards or requirements to which the agency is subject. Includes compliance with legislation and with national and international standards such as the ISO9000 series. (Keyword AAA).</i>	
1.4.1	Compliance	Records documenting the surveying of boats and heritage vessels owned by the Maritime Museum. Includes surveying and inspecting the registration of motor vehicles, age and condition and seaworthiness.	<b>PERMANENT</b>
1.4.2	Compliance	Records documenting compliance with the relevant safety authority requirements, including maritime safety and rail safety.	<b>PERMANENT</b>
1.5	<b>Research</b>	<i>The activities involved in investigating or enquiring into a subject area of interest in order to discover facts, principles etc. Used to support the development of projects, standards, guidelines, etc. and the business activities of the agency in general. Includes following up enquiries relating to agency programs, projects, working papers, literature searches, etc. (Keyword AAA)</i>	



**History Trust of South Australia (including predecessor agencies)**

1.5.1	Research	Records documenting research projects conducted independently, as the result of a grant, or in partnership with other government or non-government organisations eg. Stories from Holden employees. Includes recordings of interviews, statistics, photographs, recommendations and manuscripts of proposed publications.	<b>PERMANENT</b>
1.5.2	Research	Facilitative records of research including draft documents and travel documents.	<b>TEMPORARY</b>  Destroy 5 years after action completed.

History Trust of South Australia (including predecessor agencies)

Item No.	FUNCTION Activity / Process	Description / Disposal Class	Disposal Action
<b>CURATORIAL SERVICES</b>			
<b>2</b>	<b>Curatorial Services</b>	<b>The function of providing expert advice and services associated with museum and collection management, interpretation, writing and presentation of South Australian history. Includes assistance provided to external organisations.</b>	
2.1	<b>Advice</b>	<i>The activities associated with offering opinions by or to the organisation as to an action or judgment. Includes the process of advising. (Keyword AAA).</i>	
2.1.1	Advice	Records documenting strategic curatorial advice to government agencies and to the public, relating to objects in their possession. Includes advising on the transfer and dispersal of collections.	<b>PERMANENT</b>
2.1.2	Advice	Records documenting general advice including enquiries about donations, photographs, objects owned or found.	<b>TEMPORARY</b> Destroy 8 years after action completed
2.2	<b>Curatorial Assistance</b>	<i>The activity of providing practical curatorial expertise to external government and corporate organisations. Includes paid and unpaid services.</i>	
2.2.1	Curatorial Assistance	Records documenting strategic curatorial assistance for objects such as the inventory of memorabilia at the South Australian Housing Trust and other organisations. Includes responsibility for state-owned objects managed by other agencies, artefacts of material value, and contracts for provision of curatorial services, including associated reports.	<b>PERMANENT</b>
2.2.4	Curatorial Assistance	Records documenting day to day management of contracts for curatorial services.	<b>TEMPORARY</b> Destroy 8 years after action completed

History Trust of South Australia (including predecessor agencies)

2.3	<b>Museum Accreditation</b>	<i>The activity of assessing, accrediting and monitoring community museums against national standards for museums.</i>	
2.3.1	Museum Accreditation	Records documenting the evaluation, formal accreditation and ongoing monitoring of community museums under the national standards. Includes records of collecting organisations which join the Museums and Collections program.	<b>PERMANENT</b>

History Trust of South Australia (including predecessor agencies)

FUNDS MANAGEMENT			
3	<b>Funds Management</b>	<b>The function of attracting and managing financial income through donation, sponsorship or investment, and providing grants to the community.</b>	
3.1	<b>Community Grants</b>	<i>The activity of providing financial assistance to the South Australian community for approved museum and history initiatives.</i>	
3.1.1	Community Grants	Register of successful and unsuccessful applications from community museums for funding.	<b>PERMANENT</b>
3.1.2	Community Grants	Records of annual grant funding provided to community museums to assist their progress towards accreditation under the National Standards for Australian Museums and Galleries. Includes monitoring of the funds and acquittals.	<b>PERMANENT</b>
3.1.3	Community Grants	Records documenting annual funding under the SAHF for small community history initiatives such as interpretive projects, publications and research.	<b>PERMANENT</b>
3.1.4	Community Grants	Records of unsuccessful applications from community museums and community history initiatives.	<b>TEMPORARY</b> Destroy 5 years after action completed
3.2	<b>Income Generation</b>	<i>The activity of promoting public programs to the private and public sectors and establishing partnerships to acquire funds of in-kind services.</i>	
3.2.1	Income Generation	Records documenting the development of corporate and government sponsorship to support the Trust. Includes the development of proposals, meetings, agreements and acquittal reports.	<b>PERMANENT</b>
3.2.2	Income Generation	Records documenting the management of, or secretariat services for fund-raising entities including Foundations, including summaries and reports of funds raised.	<b>PERMANENT</b>

History Trust of South Australia (including predecessor agencies)

3.2.3	Income Generation	Facilitative and administrative arrangements in seeking funding, including unsuccessful funding bids and those not progressed.	<b>TEMPORARY</b>  Destroy 8 years after action completed
-------	-------------------	--	--

History Trust of South Australia (including predecessor agencies)

PUBLIC PROGRAMS			
4	<b>Outreach and Standards Program</b>	<b>The function of providing to the public, programs and services that interpret, exhibit, educate and facilitate access to the collections.</b>	
4.1	<b>Programs and Services</b>	<i>The activity of promoting and providing curriculum-linked programs that interpret the collection, to teachers and students and other non-education sectors.</i>	
4.1.1	Programs and Services	Records documenting the development of educational programs and services to schools. Includes vacation programs to support exhibitions.	<b>PERMANENT</b>
4.1.2	Programs and Services	Records documenting the development of workshops and training programs about history, museums and collection management for community and corporate audiences.	<b>PERMANENT</b>
4.1.3	Programs and Services	Records documenting the delivery of workshops and training programs.	<b>TEMPORARY</b> Destroy 2 years after action completed
4.1.4	Programs and Services	Records documenting community access and education programs including those provided to community groups. Includes guided tours, programs for people with disabilities and web-based outreach programs for disadvantaged sectors of society.	<b>PERMANENT</b>
4.1.5	Programs and Services	Records documenting reference services provided to the public through public program databases, library holdings and research facilities eg shipping lists. Includes research relating to public enquiries.	<b>PERMANENT</b>
4.1.6	Programs and Services	Facilitative records of visitors, including booking sheets, visitor registers and passenger manifests for tours and cruises.	<b>TEMPORARY</b> Destroy 100 years after action completed

History Trust of South Australia (including predecessor agencies)

4.2	<b>Exhibiting</b>	<i>The activity of presenting South Australian history through exhibitions, including through the collections of the History Trust, physically and online.</i>	
4.2.1	Exhibiting	Records documenting the research, development, design and installation of exhibitions. Includes working files or workbooks of the exhibition, contracts, descriptive text and labels, images, graphics and multimedia, condition reports, specifications, copyright clearances, permissions and indemnities, media releases and press reports.	<b>PERMANENT</b>
4.2.2	Exhibiting	Master copies of recorded commentaries and notes for exhibitions, tours and cruises. Includes self-guided tour notes.	<b>PERMANENT</b>
4.2.3	Exhibiting	Records documenting research conducted of historical periods or events for exhibitions.	<b>PERMANENT</b>
4.2.4	Exhibiting	Project documentation to maintain and enhance core exhibitions. Includes interpretation, expanding existing sections, renewing graphics.	<b>PERMANENT</b>
4.2.5	Exhibiting	Records of visitors, including booking sheets, visitor registers and financial statistics captured at point-of-sale.	<b>TEMPORARY</b>  Destroy 100 years after action completed.
4.2.6	Exhibiting	Records documenting arrangements for storage, workshops and display space, including berths for vessels and garaging for vehicles.	<b>TEMPORARY</b>  Destroy 10 years after action completed.
4.2.7	Exhibiting	Records documenting special exhibitions brought in or visiting Trust museums. Includes interstate and international exhibitions.	<b>TEMPORARY</b>  Destroy 8 years after action completed.
4.2.8	Exhibiting	Records documenting programs to rotate or changeover objects on long term display.	<b>TEMPORARY</b>  Destroy 2 years after exhibition or display ceases.

History Trust of South Australia (including predecessor agencies)

4.2.9	Exhibiting	Facilitative records for exhibition activities, including drafts for texts, graphics and labels. Also includes models.	<b>TEMPORARY</b> Destroy 2 years after action completed.
-------	------------	--	---