**6.11 Archives Guidelines**

Parnell District School will retain will keep record for certain periods of time to meet such legal requirements as tax and education legislation

Schools are not permitted to destroy or dispose of particular school records without Archives New Zealand’s authorization.

The School Records Retention/Disposal Schedule identifies the school records that can be discharged, destroyed or disposed of or those that must eventually be sent to Archives New Zealand. The schedule allows that records of long term value to the school can be identified

The school can make space and reduce administration costs by disposing or records as they are no longer required.

The office manager has the responsibility for ensuring the requirements of the Public Records Act are followed and that Board members are aware of their responsibilities.

Drafted May 2014

**The School Records Retention/Disposal Schedule (Archives NZ)**

**Historical**

 This covers records and memorabilia collected by the school as part of the documentation of its history, including photographs, newspaper clippings and other documentation of its interaction within the local and wider community. This section also includes records related to a school's special character (integrated schools) or designated character (schools established under section 156 of the Education Act 1989) and records that relate to the philosophy, culture or traditions of a school.

**Notes:**

1. The schedule covers all possible records a school may create. Not all schools may create/keep records in all categories.

2. The stated retention period is a minimum period and you can keep the record longer if you wish. You should consider any possible issues involved in doing this (e.g., privacy, liability, etc.).

3. Do not destroy any record older than 1945 - contact Archives New Zealand for advice.

4. Records of integrated schools prior to integration are not required to be sent to Archives New Zealand, however if an integrated school closes, it may wish to offer these records to Archives New Zealand.

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| No | Record  | Examples  | Action |
| 6.1  | Photographs recording significant events/milestones in the history of the of the school, where the persons, events and dates have been identified and recorded (see 6.10 for records related to the special character (integrated schools), or designated character (schools established under section 156 of the Education Act 1989))  | Ceremonial occasions (appointments of principals. visiting dignitaries, etc.) Jubilees Major sports Major awards tournaments Retirements of long serving staff Visits from famous former staff or students Major new building and/or restoration work Significant bequests, donations, etc. | Keep indefinitely May be sent to Archives NZ after 10 years(not sooner) |
| 6.2  |  Other photographs  | Class, staff, department, sports team, and cadets photos Prize- givings Educational activities (education outside classrooms, school camps, international student’s activities, etc.) Class trips abroad (e,g, Gallipoli) Sports events Social events Musical/stage productions ReunionsChurch services Photos taken for routine operational or administrative purposes (inventories of furniture, damage to fittings, etc.) | Keep for as long as the school needs them for administration or reference purposes, then these records may be discharged or destroyed (see full notes) |
| 6.3  | major school productions  | Annual yearbooks/ magazines Prospectuses Newsletters relating to significant milestones /events in the history of the school  | Keep indefinitely May be sent to Archives NZ after 10 years (not sooner).Must be sent to Archives after 25 years, unless arrangements are made with Archives NZ for the school to keep them longer |
| 6.4  | Routine newsletters, circulars, etc.  | Staff, students, parents/ carers newsletters/ notices Newsletters/notices about routine school programmes, activities and events  | Keep for as long as the school needs them for administration or reference purposes, then these records may be discharged or destroyed (see full notes) |
| 6.5  | Newspaper clippings'/collections rela ting to the school, staff and/or students (past or present)  | Scrapbooks of newspaper clippings  | Keep for as long as the school needs them for administration or reference purposes, then these records may be discharged or destroyed.(see full notes). |
| 6.6  | Documentation and other records of significant events/ milestones in the history of the school, such as booklets, correspondence, scrapbooks, film, and audiovisuals (see 6.10 for records related to an integrated school's special character, or to the designated character of a school established under section 156 of he Education Act 1989).  | School historiesRecorded oral histories Ceremonial occasions (appointment of principals, visiting dignitaries etc)Jubilees Major sports tournaments Major awards Retirements of long-serving staff Visits from famous former staff or students Major new building and/or restoration work Significant bequests, donations etc  | Keep indefinitely May be sent to Archives NZ after 10 years (not sooner)Must be sent to Archives NZ after 25 years, unless arrangements are made with Archives NZ for the school to keep them longer |
|  6.7  | Documentation and other records of school functions/ Occasions as part of normal school activities, such as correspondence, administration files, scrapbooks, film, and audiovisuals  | Prize givings Sports events Social occasions Musical/stage productions House activities Reunions  | Keep for as long as the school needs them for administration or reference purposes, then these records may be discharged or destroyed (see full notes). |
| 6.8  | Former Department of Education filmstrips(including any associated teaching notes)  | Transport - How we Carry Things in NZ" (1957) "Takahe valley - the Notornis" -Forests of Westland' (1955) -Five Generations of NZ Women" 'Feeding a City - Eggs' (1957) -High Country Sheep Station' The Development of Manufacturing in NZ "The Modern Eskimo - Canada's North"  "The Strange History Of Tea''‘London'Boxed sets of children's stories containing teacher's notes, a film strip, a cassette or record sound recording -Anna Follows the Reindeer" "Robinson Crusoe" -Call of the Wild'  | Keep for as long as the school needs them for administration or reference purposes, then these records may be destroyed with the permission of the board of trustees |

 **Student Records**

This covers enrolment, admission and withdrawal, attendance and progress records relating to individual students, punishment records and student's own work.

Notes.

1. The schedule covers all possible records a school may create. Not all schools may create/keep records in all categories.

 2. The stated retention period is a Minimum period and you can keep the record longer if you wish. You should consider any possible issues involved in doing this (e.g. privacy, liability, etc).

 3. Do not destroy any record older than 1945 - contact Archives New Zealand for advice.

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| No | Record | Examples  | Action |
| 1.1  | Enrolment Record E19/22A (except for those relating to students in1.7)  | The front of Record Form E19/22A (white card)  | When the student goes to another school, forward to the new school if requested. Keep a photocopy (see 1.2) |
| 1.2  | Other enrolment information, forms, etc. (except for those relating to students in 1.7)  | Enrolment forms/ information developed by the school Photocopies of E19/ 22A E19/22A forms not requested by another school  | Keep for 7 years after the student has left the school, then they may be destroyed with permission of the board of trustees |
| 1.3  | Daily attendance registers  | Attendance registers Roll books  | Keep for seven years after the date of the last entry, them they may be destroyed with permission of the board of trustees (but see 1.4 if admission and withdrawal information is lost) |
| 1.4  | Admission and withdrawal registers  | Register books SMS data  | Keep indefinitely May be sent to Archives NZ 10 years after last entry (not sooner) Must be sent to Archives NZ 25 years after date of last entry unless arrangements are made with Archives NZ for the school to keep them longer |
| 1.5  | Student progress records (excludes students in 1.7, and also excludes students, own work - see 1.8)  | School reports Testimonials Test resultsUnit standard passes Student internal assessment grades External exam results Older records, such as logbooks, examination registers, progress and achievement registers Student health registers ( including psychiatric reports) Student legal records( custody and criminal reports  | Keep for as long as the school needs them for school business or reference purposes, then they may be destroyed with the permission of the board of trusteesDo not return them to the student. Consider privacy issues when dealing with requests to see or copy this information  |
| 1.6  | Punishment records  | Punishment books Detention books Punishment data  | Keep indefinitely. May be sent to Archives NZ 10 years after last entry (not sooner) Must be sent to Archives NZ 25 years after date of last entry, unless arrangements are made with Archives NZ for the school to keep them longer |
| 1.7 | Records in 1.1, 1.2 and 1.5 above, relating to students who received significant awards or honours and /or , or achieved high distinction or fame ( does not include infamous students)  | Order of NZ Order Of Merit National or international academic awards, such as honorary doctorates, academic medals and literary prizes  National /international sporting awards, such as Olympuc medals and or world titles Students such as distinguished /famous All Blacks/Silver Ferns | Only applies where the school still has the student’s award/honour or achieves fameKeep indefinitely Do not return them to the studentKeep indefinitely |
|  1.8  | Student's own work  | Essays Project work Artwork  | Keep as long as the school needs them for school business or reference purposes, thenreturn them to the student |

**Governance**

This covers the documentation associated with the board of trustees and its activities relating to the control and management of the school.

Notes:

1. The schedule covers all possible records a school may create. Not all schools may create keep records in all categories.

 2. The stated retention period is a minimum period and you can keep the record longer if you wish. You should consider any possible issues involved in doing this (e.g., privacy, liability, etc).

3. Do not destroy any record older than 1945 - contact Archives New Zealand for advice.

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| No  | Record | Examples | Action |
| 2.1  | Minutes and agendas of board of trustees meetings, and other records documenting the board's decisions and discussions including (its committees)  | Board of trustees minutes and agendas Board of trustees committee minutes and agendas. Papers, such as reports attached to the minutes | Keep indefinitely May be sent to Archives NZ after 10 years (not sooner)Must be sent to Archives NZ after 25 years, unless arrangements are made with Archives NZ for the school to keep them longerIf the school is closing, sort. List, box and send these records to the local /regional Ministry of Education office for off-site storage and eventual transfer to Archives NZ |
| 2.2  | Charter, strategic plans and goals documents(see 2.4 below for other planning and policy documents)  | CharterStrategic plan School goals 10YPP or its equivalent in integrated schools  | Keep indefinitely Keep an audit trail of changes May be sent to Archives NZ after 10years ( not sooner) |
| 2.3  | Annual report  | Board of trustees annual report  | Keep indefinitely May be sent to Archives NZ after 10 years (not sooner) |
| 2.4 | Significant school policies and procedures ( see 2.2 above for strategic plan etc., and 2.5 for those policies where the Ministry of Education regulates the content * Policies
* Board of Trustees by laws
* Procedures
* Guidelines
* School rules
* Codes of practice
 | Codes of conduct Health and safety Personnel  Sexual harassmentAccident and sicknessSchool transportComplaints and DisciplineTreaty of Waitangi  | Keep indefinitely May be sent to Archives NZ after 10 years (not sooner) |
| 2.5  | Routine school policies, plans, procedures, guidelines, rules, codes of practice, etc. (includes those developed under the NEGs or NAGS)  | Curriculum delivery Evaluation and assessment Reporting on student achievement Property Meeting procedure Purchasing Financial Student attendance, suspension or withdrawal Special needsOperational plans  | Keep for as long as the school needs them for administration or reference purposes, then they may be destroyed with the permission of the board of trusteesIf the school is closing, these records may bedestroyed with the permission of the board of trustees/residual agent |
| 2.6 | Board of trustees election administration records  | Advertisements Candidate statements Voting forms Electoral Rolls  | Send voting forms to the District Court as soon as possible after the election result is declared |
|  2.7  | Significant correspondence of the board of trustees such as matters of significant community interest, matters relating to major school programmes and activities, and matters relating to the legal rights and interests of principals, staff, students and parents. Includes significant correspondence with associations, such as parents, friends and old students associations, but note that they are separate associations and their own records are not covered by this schedule  | Erecting monuments to mark significant community or cultural events such as statues, and carved gateways Visits of dignitaries such as the Governor General, and a famous ex-student School jubilees Significant facilities developed as a result of major fundraising initiatives, such as community pools, arts centres, and gymnasiumsMajor changes of school uniform  Major disastersSchool closuresComplaints  | Keep indefinitely May be sent to Archives NZ after 10 years(not sooner) |
| 2.8  | Operational correspondence of the board of trustees kept for audit purposes, that does not fall within 2.6 above. Includes operational correspondence with associations, such as parents, friends and old students associations, but note that they are separate associations and their own records are not covered by this schedule  | Correspondence and other documentation regarding conflicts of interest notification to the Ministry of Education Requests for funding Student achievement Setting up sports clubs Discipline matters of a general nature Routine fund-raising activities  | Keep for 7 years after the date of the last action, then it may be destroyed with permission of the board of trustees If the school is closing, sort, list, box and send these records to the local/regional Ministry of Education office for off-site storage. They may then be destroyed when the 7 year period expires |
|  2.9  | Routine correspondence and other records of the board of trustees that do not deal with matters falling into 2.6 and 2.7above Includes routine correspondence with associations, such as parents, friends and old students but note they are separate associations and their own records are not covered by this schedule  | Advertising Ministry circulars/ gazettes Thank you letters to parents Training brochures General procedural information from the Audit NZ  | Keep for as long as the school needs them for administration or reference purposes, then they may be destroyed with the permission of the board of trustees |