School Records
Retention/Disposal
Information Pack
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### Schedule

#### STUDENT RECORDS

- Enrolment records, attendance records, admission and withdrawal records, progress records relating to individual students, punishment records, and student’s own work

#### GOVERNANCE

- Board minutes and agendas, charters, strategic plans and goal documents, annual reports, school policies, BOT election administration records, and BOT correspondence

#### PERSONNEL

- Personnel records of staff and principals, payroll, salaries, leave, staff attendance, staff grievances and disputes, general recruitment administration, training and development correspondence, and accident register

#### FINANCE

- Routine accounting records, loans and investments, budgeting and financial reporting, funding, insurance policies and claims, audit reports, and records of fraud and theft

#### PROPERTY AND ADMINISTRATION

- Land ownership (POD), leases, occupancy licences, equipment leases, building plans, property maintenance, disposal of major capital assets, stores, supplies, asset register, vehicle records, contracts, tender reports and documentation, routine administration, and teaching materials

#### HISTORICAL

- Photographs, major school publications, newsletters and circulars, newspaper clippings, documentation of significant school events, former Department of Education filmstrips, memorabilia, and records related to a school’s special character (integrated schools) or designated character (schools established under Section 156 of the Education Act 1989)

### Contacts

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School Records Fact Sheet using the Retention/Disposal Schedule

This fact sheet outlines the benefits of the School Records Retention/Disposal Schedule, and schools’ responsibilities for retaining and disposing of school records. It also explains how to use the schedule.

How does a records retention/disposal schedule help schools?
A retention/disposal schedule gives schools a clear process and authority about how long to keep school records, why they have to keep them, and what needs to happen to them when they are of no further use to the school. Schools can save space and reduce administration costs by disposing of records as soon as they are no longer required. The schedule also allows records of long-term value to the school to be readily identified.

What are schools’ responsibilities to retain and dispose of records?
Schools need to keep records for certain periods of time to comply with legal requirements such as tax and education legislation. State and state integrated schools also have broader responsibilities to retain some school records for archival purposes. These schools cannot destroy or dispose of any school records without Archives New Zealand’s authorisation. The School Records Retention/Disposal Schedule identifies the school records that can be discharged, destroyed or disposed of, and those which must eventually be sent to Archives New Zealand.

How to use the School Records Retention/Disposal Schedule

Examples: You want to find out how long you need to keep:
- a cleaning contract
- board of trustees minutes for 1994

1. Find the part of the schedule which applies to the record

There are six parts to the schedule:
1. Student Records
2. Governance
3. Personnel
4. Finance
5. Property and Administration
6. Historical

Each part contains a broad definition of the types of records covered.
3. Find what retention/disposal actions apply to the record

The “action” column for the category you have selected will tell you how long you need to keep the record and what actions need to be taken after that.

Examples:
► The cleaning contract needs to be kept for 7 years after the year in which the contract ends. After that, it may be destroyed with the permission of the board of trustees.
► Board of trustees minutes need to be kept indefinitely, for eventual transfer to Archives New Zealand. These minutes could be sent to Archives New Zealand now, as they are 10 years old. Your school can retain them longer if you wish, but after 25 years you will need to contact Archives New Zealand if you still want to retain them at that stage.

Tip: 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 such as privacy and liability.

4. Find out why these retention and disposal rules apply to the record

Each category includes “reasons” for retention and disposal of the relevant records.

Examples:
► There are two reasons why the cleaning contract needs to be kept for this period. The most important reason for your school is to protect your position if any legal action arises within the set time the law allows. The contract should also be kept for audit purposes.
► Board of trustees minutes are an important reference for your school, and you may want to keep them for a long time. They are also considered to be of broader archival value, so they will eventually be required to be sent to Archives New Zealand.

Tip: If you are in doubt about particular legislation as it applies to your circumstances, you should obtain legal advice. While the schedule will be updated from time to time, legislation may change in the interim. You can also contact the New Zealand School Trustees Association (NZSTA) for advice. The NZSTA help desk number is 0800782435.

Discharging Records

One of the ways of disposing of records is through the process of discharging them.

Only some categories of school records can be discharged. The schedule shows which records these are. When these records are no longer required by the school, the board of trustees can allow them to be given into the care of an organisation (e.g. the local hall society, marae committee or library) or given into the care of an individual. According to the Public Records Act 2005, if records are being discharged into the care of an individual, that person cannot be an employee of the school.

Develop a standard process for authorising the discharge of school records

► Discharge records annually or at other appropriate intervals, rather than a little at a time.
► Consult the schedule to check whether the records may be discharged. If you are in doubt, contact the Network Development Officer at your local/regional ministry office.
► Check that the records are no longer required by the school for administration or reference purposes (including any pending legal actions).
► Obtain sign-off from the chairperson of the board of trustees before any records are discharged. Any delegation of this authority to the appropriate person should be minuted.
Record the authorisation for the records to be discharged (e.g. ‘agreed in the board of trustees minutes dated XXX’, in your documentation on your filing system). This means that if they are required at a future time it will be easy to track where they have gone. This also acts as evidence that you have followed a documented process when discharging a particular record (see Creating, Using and Maintaining Records fact sheet).

Mark on the records that they have been discharged and the details of the process (a school stamp with a note to say it has been discharged, the record class reference from the school records schedule and the date of discharge).

Once records have been discharged they are no longer public records. This means that they are no longer the responsibility of the board and are not governed by the Public Records Act 2005.

Destroying Records
The schedule identifies which school records can be disposed of by destroying them. Some schools will choose to retain records longer than the time at which the schedule says they can be destroyed – others will destroy them as soon as possible.

Develop a standard process for authorising destruction of school records
▶ Destroy records annually or at other appropriate intervals, rather than a little at a time.
▶ Destroy records annually or at other appropriate intervals, rather than a little at a time.
▶ Consult the schedule to check whether the records may be destroyed. If you are in doubt, contact the Network Development Officer at your local/regional ministry office.
▶ Check the age of the records to ensure the retention period has expired.
▶ Satisfy yourself that the records are no longer needed for school administration or reference purposes (including any pending legal actions).

Obtain sign-off from the chairperson of the board of trustees before any records are destroyed. Any delegation of this authority to the appropriate person should be minuted.

Keep a record of the records to be destroyed in your documentation on your filing system (e.g. ‘agreed in the board of trustees minutes dated XXX’).

Note your next date for reviewing the records, if you are going to retain them for a longer period. This ensures records are kept no longer than necessary.

Destroy records securely and completely
▶ Select a destruction method that ensures the record is completely destroyed such as shredding.
▶ Avoid dumping the records as there is no guarantee that the record will be destroyed completely or straight away.
▶ Take extra care with sensitive or confidential items.
▶ Shred electronic items such as film and audiovisual tapes.
▶ Delete electronic records. If you have any concerns that sensitive electronic records have not been completely destroyed, contact Archives New Zealand for advice.

Document your destroyed records
Ensure your documentation shows when a record has been destroyed. This acts as evidence that you have followed a documented process when destroying a particular record (see Creating, Using and Maintaining Records fact sheet).

Tips for transferring records to Archives New Zealand

Decide where you would like to transfer your records
▶ In some cases, schools can deposit school records in a local archives repository rather than with Archives New Zealand. If your school is interested in this option, contact Archives New Zealand to discuss this.
Plan for periodic transfers

► Wait until you have a reasonable quantity of records before organising a transfer to Archives New Zealand. Transfer records annually, or every two or three years, or at other appropriate intervals rather than a little at a time.
► Contact Archives New Zealand before preparing records for transfer.

Follow Archives New Zealand’s listing and boxing requirements

► Use the Archives New Zealand template to list records in electronic format. This is available from Archives New Zealand’s website www.archives.govt.nz
► Box the records in Archives New Zealand boxes. These are provided by Archives New Zealand free of charge.

Check any special conditions with Archives New Zealand

► Notify Archives New Zealand if you are transferring any records that may need special boxing requirements such as large items (maps, plans, registers, etc.) photographs, films, disks.
► You may want to consider appropriate access conditions for the records you are transferring. Notify Archives New Zealand if you want to place any access restrictions on the records. If you do this, your school will need to sign an access authority (available from the Archives New Zealand website www.archives.govt.nz) and process any future access requests for the restricted records.

Send documentation to Archives New Zealand

► Obtain a transfer agreement form from Archives New Zealand. This is available from Archives New Zealand’s website www.archives.govt.nz
► Send the list of records and the completed transfer agreement (and access authority if necessary) to Archives New Zealand.
► When Archives New Zealand is satisfied the records are ready for transfer, they will arrange a time for the records to be delivered to them.

Document your transferred records

Note your list of school records to show when a record has been transferred to Archives New Zealand. This will enable you to refer to it again easily, or direct queries to Archives New Zealand (see Creating, Using and Maintaining Records fact sheet).

Where to go for more information

A list of organisations you can contact for further information or advice on school records and recordkeeping is included as part of this package.
School Records Fact Sheet
creating, using and maintaining records

This fact sheet outlines the benefits and responsibilities for creating, using and maintaining school records. It also provides some tips for keeping good records.

What’s good about keeping records?
Your records are a valuable source of information about the achievements and history of your school. Good record keeping enables you to find accurate information easily and can reduce administration costs because you are only keeping what you have to. It provides you with reliable evidence of your actions and decisions if you need to back them up, such as in a dispute over a contract. The Retention and Disposal Schedule allows you to refer to a clear process and documentation about what should be done with your school records and when different actions can be taken.

What are schools’ record keeping responsibilities?
Schools need to keep good records to comply with legal requirements such as tax and education legislation. Under the Public Records Act 2005, state and state integrated schools also have broader responsibilities to keep good records as part of New Zealand’s archival history.

Tips for creating, using and maintaining records

Be clear about what is a “school record”
► Most items created or received by the board, principal or staff as part of school business are “school records”. Some examples are correspondence, attendance registers, accounts, school reports, contracts, minutes of board of trustee or staff meetings, newsletters, and class photographs. You will find many more examples in the School Records Retention and Disposal Schedule.
► A “school record” can be in a range of formats, including email, electronic documents and databases, paper files, photographs and audiovisual recordings.

► Many items received for reference purposes are not school records such as booklets and circulars from other educational institutions or associations. You can keep your filing system to a minimum by keeping these items out.

Create an accurate record
To create school records that are accurate, you should:
► Clearly and accurately note your important activities, preferably as they happen. For example, if you have made a significant decision verbally, note the essential details and file it.
► Note the details necessary to make sense of a record such as the time and date of a decision and who made it, the names of people in a photograph, etc.

Develop a process for keeping your school records
► Keep school records in your school filing system rather than in a number of personal systems. This includes email and other electronic records.
► Use standard names for records that everyone understands.
► Keep a list of school records.
► Consider a simple file numbering or alphabetical system.
► Have a procedure stating how records are processed.

Identify a key person to coordinate your records process
► Designate a person as the point of contact for your records process.
► Keep your records process current and advise your board of trustees and staff on how to use it.
Ensure records can be found when needed

► File records regularly and discourage their alteration or removal from a file.
► Consider using location cards to keep track of who has taken out a paper file.
► Store records in a place where the risk of damage or unauthorised access is low (see Storing and Handling Records fact sheet).
► Back up electronic records regularly and transfer them to any new or upgraded software (see Keeping Electronic Records fact sheet).

Where to go for more information

A list of people/organisations you can contact for further information or advice on school records and record keeping is included as part of this package.
How can good records storage and handling help schools?

Good records storage and handling enables schools to find information easily using a simple process. It keeps relevant school records together and therefore provides reliable information. It minimises the risk of unauthorised access to stored information, and protects and preserves valuable information about the achievements and history of the school.

What are schools’ records storage and handling responsibilities?

Schools need to keep reliable records for certain periods of time. This enables schools to comply with legal requirements such as tax and employment legislation. State and state integrated schools also have broader responsibilities (under the Public Records Act 2005) to keep some of their records intact for archival purposes.

Tips for storing school records

Select a suitable storage method

- File records in files that are practical for normal use and will keep the record intact for however long it needs to be kept. Examples of files include standard paper file covers, box files, lever arch files, floppy disks, CD-ROMs, USB memory sticks and electronic directory structures (see also Keeping Electronic Records fact sheet).
- Store paper files on shelves which support files in an upright position without squashing or crushing them.
- Keep a list of school records and check from time to time that all files are accounted for.
- If you need archival boxes for general use, contact Archives New Zealand. Either wax lined or acid free boxes may be best for storing records that are of long term value.

- For storage of maps and plans, photographs, audiovisual and electronic media, refer to Tips for handling school records in this fact sheet.

Locate records in an appropriate place

Consider how often your school needs to find particular records and keep the records needed most often in an accessible place.

- Store records in places where the risk of damage or unauthorised access is low.
- Identify the records your school needs most to continue to function, and store them in the safest areas.

Keep records secure

- Keep confidential records in a locked storage area such as a filing cabinet.
- Develop a school computer systems security procedure, which includes protecting passwords.
- Apply your health and safety procedures to records
- Keep records storage areas clean and pest free.
- Keep records clear of potential hazards such as heaters or electrical installations.
- Minimise environmental hazards
- Keep records out of sunlight.
- Store records away from areas at risk from flooding or leaks.
- Store records off the floor for example on pieces of wood.
- Keep a records disaster recovery kit

A simple kit for protecting records after disasters (e.g. flooding or fire) includes:
A tarpaulin or ground sheet to cover the records.

- Material for blotting up spills and leaks such as cloths, tissues, or old towels.
- Oven bags for putting water damaged records into.
- Cleaning equipment such as a bucket, brush and shovel and heavy gloves.
- Freezing wet records will prevent further deterioration.

**Tips for handling school records**

**Paper files**
- Keep sellotape, plastic, bulldog and paper clips out of files. Some of these items can take up a lot of space in your filing system, and can damage records which need to be kept for a long time.
- Leave filed papers in the file, in place and unaltered.

**Photographs and negatives**
- Avoid touching the image.
- Use a soft lead pencil on the back of a photograph to identify the subject.
- Use labels on the negatives packaging to identify the subject.
- Store away from sunlight or extreme temperatures humidity.
- Avoid mounting photographs using sellotape, glue, bluetac or other adhesives.

**Audiovisual and electronic records**
(Includes audio, video and computer tapes, floppy disks, CD-ROMs, USB memory sticks, etc.)
- Store away from magnetic fields such as speaker cabinets and metal shelves.
- Store away from sunlight or extreme temperatures/humidity.
- Write labels separately, then place them on the container of the video, tape, floppy disk, etc.
- Keep playing equipment clean.
- Return items to containers after use.
- Transport and use items with care, rewinding tapes when finished.
- Rewind tapes and videos every six months.

**Where to go for more information**
A list of people/organisations you can contact for further information or advice on school records and record keeping is included as part of this package.
School Records Fact Sheet
keeping electronic records

This fact sheet outlines the benefits of keeping good electronic records, and schools’ responsibilities when they keep school records in electronic formats. It also provides some tips for keeping good electronic records.

Electronic records include email, electronic documents, spreadsheets, databases, digital images and sound files.

What advantages do good electronic records give schools?
Communicating and finding information can be quick and easy when messages, documents and images are created and kept in electronic format. However, this information can often be unstructured, easily altered, and spread over a variety of personal systems. Therefore, electronic records should be kept in a systematic way and stored in a safe, reliable medium. CD-ROMs, USB memory sticks and other means of electronic storage of information need to be protected from unauthorised alteration or deletion so that schools can access reliable and relevant information.

What are schools’ responsibilities when keeping electronic records?
The records schools need to keep to comply with legal requirements include records kept in electronic format such as email and electronic documents. Where school records are kept in electronic format, schools are responsible for ensuring they remain readable and reliable for as long as they need to be kept. State and state integrated schools also have broader responsibilities to keep records for archival purposes, including records kept in electronic format.

Some tips for keeping good electronic records

Be clear about what is your “master school record”
► Consider a “print and file” policy where practical. For example, printing and filing important emails may be easier than saving them into your school’s main electronic system.

Where you decide the electronic record is your master school record, incorporate this into your records process (see Creating, Using and Maintaining Records fact sheet).

Integrate electronic records into your school filing system
► Keep electronic records, including emails, in your school’s main electronic system, not in personal electronic directories or systems.
► Use the same standard names for both paper and electronic records.
► If you have a computer directory of file folders in your school’s main electronic system, set this up to have the same naming structure as your school filing system.

Secure your electronic records
► Regularly back up computer files and store the back up copy in a separate, secure place.
► Develop a computer systems security procedure for your electronic records, which includes protecting passwords.

Plan for longer term accessibility of your electronic records
Unlike paper records, electronic records may become unreadable if the software or medium they are stored on (for example, old computer tapes) becomes obsolete or is no longer supported. Where this is an issue, and your school still needs to keep the record, you will need to take steps to ensure it remains accessible (see Using the School Records Retention/Disposal Schedule fact sheet for a guide to time periods).
► Transfer electronic records to any new or upgraded software.

► When upgrading, consider selecting common, widely supported software.

► Check that the storage medium you are using (for example, floppy disks, USB memory sticks, CD-ROMs and DVDs) will last for as long as you need to keep the records, and transfer the records if necessary.

**Store electronic records to minimise deterioration**

Store away from magnetic fields, sunlight or extreme temperatures/humidity (see also *Storing and Handling Records fact sheet*).

**Where to go for more information**

A list of people/organisations you can contact for further information or advice on school records and record keeping is included as part of this package.
School Records
frequently asked questions

1. What is a school record?
Most items you create or receive as part of school business are school records. This includes correspondence, accounts, school reports, minutes and class photographs. Items received for reference purposes are generally not school records. This includes booklets and circulars from other educational institutions or associations.

For further examples, refer to the School Records Retention and Disposal Schedule.

Refer also to the fact sheet Creating, Using and Maintaining Records.

2. Do we have to implement the School Records Retention/Disposal Schedule?
Yes, implementation of the schedule is a requirement of the Public Records Act 2005. Therefore, it is part of the responsibility of running a school. The schedule has been authorised by Archives New Zealand. It gives your school clear information about how long to keep records, why you have to keep them, and what needs to happen to them when they are of no further use to your school.

3. Are any schools exempt?
Under the Public Records Act 2005, the School Records Retention/Disposal Schedule applies to state and state integrated schools. Private schools are not covered by the Public Records Act 2005, so there is no requirement for them to send their records to Archives New Zealand. Private schools may, however, find the schedule a useful reference. Integrated schools should note that any of their records that are prior to integration are not covered by the schedule.

4. When is this happening?
When you receive this information pack, it is expected that schools will begin using it. The fact sheets are intended as a general guide for schools on good record keeping practices.

5. What are the resourcing implications for our school?
It is expected that schools will already have filing systems and processes in place, and the schedule provides detail about how long to keep particular school records. There is also a focus on the adequacy of storage and proving that the records exist (or have been discharged or disposed of as required). The school records fact sheets developed by the Ministry of Education give common sense advice on good record keeping practice.

6. Are there legal requirements relating to school records? Where do I find them?
There are many legal requirements relating to school records such as tax and education legislation. In addition, state and state integrated schools need to comply with the Public Records Act 2005. The School Records Retention/Disposal Schedule includes a list of legal requirements relating to the time periods for keeping records.

7. Do we need to create or keep all the records listed in the School Records Retention/Disposal Schedule?
Not necessarily. The schedule covers all possible records a school may create. Not all schools may create or keep records in all categories.

8. Do we need to change our school filing system?
No, as long as it is a formal system and accessible to everyone who uses it. School records should be kept in your school filing system, rather than in a number of personal systems. A school filing system need not be complex.

Refer to the fact sheet Creating, Using and Maintaining Records for tips on setting up a process for keeping your school records.
9. Do we need an archives room to store our school records?
   No. Adequate shelving in clean, dry locations is generally sufficient. For further information, refer to the fact sheet Storing and Handling Records.

10. Do school records have to be kept on the school site?
    No, but records that are needed frequently should be kept in an easily accessible place. School records do need to be stored safely and securely in a place where your school can keep track of them over time. They should not be kept at home.
    Refer to the fact sheet Storing and Handling Records.

11. What do I need to know about keeping electronic records?
    Electronic records need to be considered as part of your school filing system. As systems change you will need to ensure they remain readable for as long as you need to keep them.
    For further information, refer to the fact sheet Keeping Electronic Records.

12. Are emails included?
    Yes, if you are creating or receiving them as part of school business. A school record can be in any format, including email and electronic documents. You may find it is easier just to print and file important emails.
    Refer to the fact sheets Creating, Using and Maintaining Records and Keeping Electronic Records.

13. How do we treat items such as photographs or plans?
    Items which are different from your usual paper files need special handling such as photographs, large items (maps and plans), or videos. For tips on this, refer to the fact sheet Storing and Handling Records.

14. Who has authority over school records?
    The board of trustees of your school has the ultimate responsibility for maintaining and monitoring school records. The board can delegate this authority to an appropriate person. State and state integrated schools cannot legally destroy any items considered to be school records without the authority of Archives New Zealand. The School Records Retention/Disposal Schedule is this authority.
    Refer to the fact sheet Using the Retention/Disposal Schedule.

15. Who should have access to school records?
    Boards of trustees, principals and staff should be able to access the school records they are likely to need to carry out their work. This will vary from school to school. Some records such as personnel files, should be kept in a locked storage area, and access to them limited to authorised staff.
    Refer to the fact sheets Storing and Handling Records and Keeping Electronic Records.

16. Who decides what school records need to be kept and what can be disposed of?
    Under the School Records Retention/Disposal Schedule, Archives New Zealand has authorised what categories of records need to be kept and what can be destroyed. The person at your school with delegated authority from the board will need to use the schedule to make decisions about retaining, discharging and disposing of your school records.

17. How long do school records need to be kept?
    The School Records Retention/Disposal Schedule states the minimum periods various types of records need to be kept for. Your school may keep them longer if you wish.
18. Do we have to destroy records if we don't want to?

No. The School Records Retention/Disposal Schedule authorises schools to destroy certain records. Schools do not have to destroy them at that time. However, there can be risks involved in keeping records too long (e.g. privacy issues).

Refer to the fact sheet Using the Retention/Disposal Schedule.

19. Can records no longer needed by our school be archived to another organisation (e.g. a library or museum)?

This may be possible if the library or museum has been registered as an ‘approved repository’ by Archives New Zealand. This means that they are allowed to hold records that are identified in the schedule as public archives. Contact your local Archives New Zealand office to discuss this option.

The schedule also identifies some records that can be discharged, that is given into the care of an individual or an organisation. When this action is taken the discharged documents are no longer public records. Refer to the fact sheet Using the Retention/Disposal Schedule. Records that are identified in the schedule for destruction cannot be discharged, they must be destroyed.

20. Who should be responsible for destroying school records?

The chairperson of your school’s board of trustees is legally responsible on behalf of the board for the destruction of the items that have been identified in the schedule to be destroyed. It is the chairperson’s responsibility to ensure that they are destroyed in a secure manner. Rather than do this personally, the chairperson should delegate this authority to the appropriate person in the school. This delegation should be minuted. It is preferable that the secure destruction of the appropriate records is done periodically, rather than a little at a time.

Refer to the fact sheet Using the Retention/Disposal Schedule.

21. Do we need to send school records to Archives New Zealand as soon as the retention period is up?

No. An annual transfer or transfer every two or three years is preferable. You should contact Archives New Zealand beforehand to ensure you comply with their listing and boxing requirements.

Refer to the fact sheet Using the Retention/Disposal Schedule.

22. Can we send school records to Archives New Zealand as soon as we have finished with them?

Records generally need to be at least 10 years old before they can be transferred to Archives New Zealand.

Refer to the fact sheet School Records Retention/Disposal Schedule.

23. What happens to school records if our school closes, or merges with another school?

In the case of a merger, the records of the merging school should be forwarded to the continuing school.
If your school closes, some specific records listed in the School Records Retention/Disposal Schedule may be discharged or destroyed by the board of trustees/residual agent. All other records should be sorted, listed, boxed and sent to your local/regional Ministry of Education office. They will then be destroyed or sent to Archives New Zealand at the appropriate time. Refer to the fact sheet School Records Retention/Disposal Schedule.

24. Will our school records and records keeping processes be audited?

There is a requirement under the Public Records Act 2005 for Archives New Zealand to undertake audits of the agencies that come under the Act (this includes schools). It is estimated that audits of schools will take place in 2010-2015. Schools will be informed of the details of any audits as they are developed. At the time of publication of this document, it is unclear who will undertake the audits and the process they will use.

25. Who can I contact for further information?

A list of organisations you can contact for further information or advice on school records and record keeping is included as part of this package.
1. **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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<th>Student Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
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| 1.1 | Enrolment Record E19/22A (except for those relating to students in 1.7) | 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) The last school must keep for 7 years after the student has left the school system, then it may be destroyed with permission of the board of trustees. If the school is closing, forward to the student’s new school. If the school is closing, and the student is also leaving the school system, sort, list, box and send these records to the local/regional ministry office for off-site storage. They may then be destroyed when the 7 year period has expired | Audit purposes – refer to:  
  - Section 77A Education Act 1989  
  - Rules notified in Education Gazette 19 February 1999  
  - Education Circular 1999/03 |
| 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 If the school is closing and the student is also leaving the school system, 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 has expired | Audit purposes – refer to:  
  - Section 77A Education Act 1989  
  - Rules notified in Education Gazette 19 February 1999  
  - Education Circular 1999/03 |
<table>
<thead>
<tr>
<th>No</th>
<th>Student Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3</td>
<td>Daily attendance registers</td>
<td>Attendance registers</td>
<td>Keep for 7 years after the date of the last entry, then they may be</td>
<td>Compliance with legislation — refer to:</td>
</tr>
<tr>
<td></td>
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<td>Roll books</td>
<td>destroyed with permission of the board of trustees (but see 1.4 if</td>
<td>• Section 5 Education (School Attendance) Regulations 1951</td>
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<td>admission and withdrawal information is lost)</td>
<td>• Rules notified in Education Gazette 23 March 1998</td>
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<td>If the school is closing, sort, list, box and send these records to</td>
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<td>the local/regional Ministry of Education office for off-site storage.</td>
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<td>They may then be destroyed when the 7 year period expires</td>
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<tr>
<td>1.4</td>
<td>Admission and withdrawal registers</td>
<td>Register books</td>
<td>Keep indefinitely</td>
<td>Of archival value and required by Archives NZ — refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SMS data</td>
<td>May be sent to Archives NZ 10 years after last entry (not sooner)</td>
<td>• Section 21 Public Records Act 2005</td>
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<td>Must be sent to Archives NZ 25 years after date of last entry, unless</td>
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<td>arrangements are made with Archives NZ for the school to keep them</td>
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<td>longer</td>
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<td>If on-site storage at the school is a problem, or the school is closing,</td>
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<td>sort, list, box and send to the local/regional Ministry of Education</td>
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<td>office for off-site storage</td>
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<td>Where admission and withdrawal information is lost, schools should</td>
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<td>keep attendance registers indefinitely in their place</td>
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<tr>
<td>No</td>
<td>Student Records</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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</table>
| 1.5 | Student progress records (excludes students in 1.7, and also excludes students' own work – see 1.8) | School reports Testimonials Test results Unit standard passes Student internal assessment grades External exam results Older records, such as logbooks, examination registers, progress and achievement registers Student health records (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 trustees Do not return them to the student Consider privacy issues when dealing with requests to see or copy this information If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent, but not returned to the student | Privacy considerations – refer to:  
• Section 6 Privacy Act 1993  
Return to the student requires the approval of Archives NZ – refer to:  
• Section 25 Public Records Act 2005 |
| 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  
If a 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 | Of archival value and required by Archives NZ – refer to:  
• Section 21 Public Records Act 2005 |
<table>
<thead>
<tr>
<th>No</th>
<th>Student Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
</table>
| 1.7 | Records in 1.1, 1.2 and 1.5 above, relating to students who received significant awards or honours, and/or achieved high distinction or fame (does not include infamous students) | Students that gain:  
- 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 Olympic medals and/or world titles  
- Students such as distinguished/famous All Blacks/Silver Ferns | Only applies where the school still has the student's record when he or she receives the award/honour, or achieves fame  
Keep indefinitely | Of archival value and required by Archives NZ – refer to:  
- Section 21 Public Records Act 2005  
Privacy considerations – refer to:  
- Section 6 Privacy Act 1993 |
| 1.8 | Student’s own work | Essays  
Project work  
Artwork | Keep as long as the school needs them for school business or reference purposes, then return them to the student  
Unclaimed student work may be destroyed with permission of the board of trustees (it may be prudent to advertise in the local paper beforehand)  
If the school is closing, the board of trustees/residual agent should advertise this work is available for students to collect for a period of 2 months following the closure. It can then be destroyed if still unclaimed | These records are not "school records" but belong to the student – refer to:  
- Section 5 Copyright Act 1994 |
# School Records – Retention / Disposal Schedule

## 2. 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.

<table>
<thead>
<tr>
<th>No</th>
<th>Board Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
</table>
| 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 longer  
If 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 | Of archival value and required by Archives NZ – refer to:  
• Section 21 Public Records Act 2005 |

| 2.2 | Charter, strategic plans and goals documents (see 2.4 below for other planning and policy documents) | Charter  
Strategic 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 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. If 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 | Of archival value and required by Archives NZ – refer to:  
• Section 21 Public Records Act 2005 |
<table>
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<tr>
<th>No</th>
<th>Board Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.3</td>
<td>Annual report</td>
<td>Board of trustees annual report</td>
<td>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 If 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</td>
<td>Of archival value and required by Archives NZ – refer to: * Section 21 Public Records Act 2005</td>
</tr>
<tr>
<td>2.4</td>
<td>Significant school policies and procedures (see 2.2 above for strategic plan etc, and 2.5 below for those policies where the Ministry of Education regulates the content) * Policies * Board of trustees bylaws * Procedures * Guidelines * School rules * Codes of practice</td>
<td>Codes of conduct Health and safety Personnel Sexual harassment Accident and sickness School transport Complaints and discipline Treaty of Waitangi</td>
<td>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 If 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</td>
<td>Of archival value and required by Archives NZ – refer to: * Section 21 Public Records Act 2005</td>
</tr>
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<td>No</td>
<td>Board Records</td>
<td>Examples</td>
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<td>Reasons</td>
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<tr>
<td>2.5</td>
<td>Routine school policies, plans, procedures, guidelines, rules, codes of practice, etc. (includes those developed under the NEGs or NAGs)</td>
<td>Curriculum delivery, Evaluation and assessment, Reporting on student achievement, Meeting procedure, Property, Purchasing, Financial, Student attendance, suspension or withdrawal, Special needs, Operational plans</td>
<td>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</td>
<td>If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
</tr>
</tbody>
</table>

<p>| 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, Keep all other records after the result of the election is declared, then they may be: - discharged into the care of an individual or organisation, with the permission of the board, or - destroyed, with the permission of the board of trustees following the next set of triennial elections | Compliance with legislation – refer to: - Section 7 Education (School Trustee Elections) Regulations 2000 To preserve evidence of the election process during the period the Minister may declare it invalid – refer to: - Section 9 of 6th Schedule Education Act 1989. Note: Under this section, the Minister has several options within 60 days |</p>
<table>
<thead>
<tr>
<th>No</th>
<th>Board Records</th>
<th>Examples</th>
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<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.7</td>
<td>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</td>
<td>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 fund-raising initiatives, such as community pools, arts centres, and gymnasiums Major changes of school uniform Major disasters School closures Complaints</td>
<td>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 If 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</td>
<td>Of archival value and required by Archives NZ – refer to: * Section 21 Public Records Act 2005</td>
</tr>
<tr>
<td>2.8</td>
<td>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</td>
<td>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</td>
<td>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</td>
<td>For audit purposes – refer to: * Sections 15 &amp; 16 Public Audit Act 2001 * Section 325 Education Act 1989</td>
</tr>
<tr>
<td>No</td>
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<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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<td>2.9</td>
<td>Routine correspondence and other records of the board of trustees that do not deal with matters falling into 2.6 and 2.7 above. Includes routine 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</td>
<td>Advertising Ministry circulars/gazettes Training brochures Thank you letters to parents General procedural information from Audit NZ</td>
<td>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. If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent.</td>
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</table>
3. Personnel

This covers records relating to the employment, management and professional development of all staff, and the maintenance of a safe and healthy work environment.

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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<table>
<thead>
<tr>
<th>No</th>
<th>Personnel Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
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<tbody>
<tr>
<td>3.1</td>
<td>Personnel records of staff and principals who received significant awards or honours, and/or achieved high distinction or fame (does not include infamous staff or principals)</td>
<td>Staff and principals that gain:  - 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 Olympic medals and/or world titles  Staff or principals such as distinguished/famous All Blacks/Silver Ferns</td>
<td>Only applies where the school still has the principal or staff member’s record when he/she receives the award/honour or achieves fame. When you are destroying records under 3.2, identify and keep any that fall into this category  Keep indefinitely  Do not return them to the principal or staff member  Consider privacy issues when dealing with requests to see or copy this information  May be sent to Archives NZ 10 years after the principal or staff member has left the school (not sooner)  Must be sent to Archives NZ 25 years after the principal or staff member has left the school, unless arrangements are made with Archives NZ for the school to keep them longer  If the school is closing, sort, list, box and send these records to the local/regional Ministry of Education office for storage and eventual transfer to Archives NZ</td>
<td>Of archival value and required by Archives NZ – refer to:  - Section 21 Public Records Act 2005  Privacy considerations – refer to:  - Section 6 Privacy Act 1993</td>
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<tr>
<td>No</td>
<td>Personnel Records</td>
<td>Examples</td>
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</table>
| 3.2 | All other staff personnel records, including principals | Personnel files | Keep for 7 years after last date of employment, then they may be destroyed with permission of the board of trustees | Compliance with legislation – refer to:  
- Section 130 Employment Relations Act 2000  
- Section 6 Privacy Act 1993 |
| 3.3 | Payroll, salaries, allowances etc (see 3.2 for records kept on an individual staff member’s or principal’s personnel file) | Payroll reports  
- Incentive allowances  
- Additional payments/ remuneration made to principals  
- General records and other correspondence relating to the setting and administration of remuneration | Keep for 7 years from the end of the year to which they relate, then they may be destroyed with the permission of the board of trustees | Compliance with legislation – refer to:  
- Section 130 Employment Relations Act 2000  
- Section 6 Privacy Act 1993 |
| 3.4 | Leave and staff attendance records (see 3.2 for records kept on an individual staff member’s or principal’s personnel file) | Timesheets  
- Leave requests | Keep for 7 years after last date of employment, then they may be destroyed with permission of the board of trustees | Compliance with legislation – refer to:  
- Section 130 Employment Relations Act 2000  
- Section 6 Privacy Act 1993  
- Section 81 Holidays Act 2003 |
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<tr>
<th>No</th>
<th>Personnel Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
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<tbody>
<tr>
<td>3.5</td>
<td>Staff grievances and disputes</td>
<td>Personal grievances Disputes Discrimination complaints General complaints Disciplinary matters Dismissals General correspondence with unions</td>
<td>Keep for 7 years after date of last action, then they 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</td>
<td>Compliance with legislation – refer to: • Section 6 Privacy Act 1993</td>
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<td>If these records are kept on an individual staff member’s or principal’s personnel file, the file will need to be kept for 7 years after date of last action</td>
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<td>Note: relevant information may also be attached to board committee minutes (see 2.1 Governance Records for details)</td>
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<td>3.6</td>
<td>General recruitment correspondence and administration (see 3.2 for records kept on the successful applicant’s personnel file)</td>
<td>Position descriptions Advertising CVs Administration of recruitment/ interview process</td>
<td>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 If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
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<tr>
<td></td>
<td>Position descriptions Advertising CVs Administration of recruitment/ interview process</td>
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<tr>
<td>3.7</td>
<td>General training and development correspondence and administration (see 3.2 for records kept on an individual staff member’s or principal’s personnel file)</td>
<td>Attendance at courses, seminars, conferences etc</td>
<td>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 If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
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<tr>
<td>No</td>
<td>Personnel Records</td>
<td>Examples</td>
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| 3.8 | Non-serious accident register (staff and students) i.e. which does not contain records of accidents involving fatalities and/or prosecution (see 3.9 if the school keeps one register for all accidents) | Accident register Forms and other documentation notifying of accidents | Keep until the school closes, or in the case of a merger of schools, until the continuing school closes If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent | Compliance with legislation – refer to:  
- Section 25 Health & Safety in Employment Act 1992  
- Section 4 & Schedule Form 1 Heath & Safety in Employment (Prescribed Matters) Regulations 2003 |
| 3.9 | Serious accident register (staff and students), i.e. which includes accidents involving fatalities and/or prosecution If the school keeps one register for all accidents (serious and non-serious), these actions apply | Accident register Forms, and other documentation notifying of accidents | Keep indefinitely May be sent to Archives NZ 10 years after the date of last action (not sooner) Must be sent to Archives NZ 25 years after the date of last action, unless arrangements are made with Archives NZ for the school to keep them longer If the school is closing, sort, list, box and send these records to the local/regional Ministry of Education office for storage and eventual transfer to Archives NZ | Of archival value and required by Archives NZ – refer to:  
- Section 21 Public Records Act 2005 |
4. Finance

This covers the school’s accounting and other financial transactions, including reporting, budgeting, funding, insurance, audit and fraud.

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.

<table>
<thead>
<tr>
<th>No</th>
<th>Financial Record</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.1</td>
<td>Routine accounting records</td>
<td>Ledgers, Cash books, Creditors and debtors, Sales and purchases, Asset registers, Maintenance fees, Capital/deferred expenditure, Invoices, Receipts and receipt books, Bank statements, Cheque and deposit books, Term deposits, All IRD returns, Reimbursement for expenses claims</td>
<td>Keep for 7 years after the end of the income year to which the records relate (or 10 years if the IRD has advised of a pending audit before the 7 year period expires), then they may be destroyed with the permission of the board of trustees. If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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.</td>
<td>Compliance with legislation – refer to: • Section 22 Tax Administration Act 1994</td>
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<tr>
<td>No</td>
<td>Financial Record</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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</table>
| 4.2 | Loans and/or investments documentation | Loan agreements  
Investment agreements  
Loan or investment negotiation decisions/correspondence | Keep for 7 years after the end of the year in which the loan or investment agreement/arrangement terminates, then the records may be destroyed with the permission of the board of trustees.  
If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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 | Compliance with legislation – refer to:  
• Section 22 Tax Administration Act 1994  
For audit purposes – refer to:  
• Sections 15 & 16 Public Audit Act 2001  
• Section 325 Education Act 1989 |
| 4.3 | Routine budgeting and financial reporting | Budgets  
Monthly reports  
Quarterly reports  
Occasional reports on specific issues | Keep for 7 years after the date of the last action, then the records may be destroyed with the permission of the board of trustees.  
If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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 | For audit purposes – refer to:  
• Sections 15 & 16 Public Audit Act 2001  
• Section 325 Education Act 1989 |
<table>
<thead>
<tr>
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<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
</table>
| 4.4| Strategic records relating to the use of major sources of funding (see governance records 2.2 for documentation relating to normal operations grants for the Ministry) | Community grants, Sponsorship, Trust funds, Bequests, Donations | Keep indefinitely | Of archival value and required by Archives NZ – refer to:  
- Section 21 Public Records Act 2005 |
| 4.5| Insurance policies and claim documentation | Insurance policies, Correspondence about insurance claims | Keep for 7 years from the end of the year in which the policy ceases to be current, and all claims under it are resolved, then the records may be destroyed with the permission of the board of trustees  
If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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 | Compliance with legislation – refer to:  
- Section 22 Tax Administration Act 1994  
- Sections 15 & 16 Public Audit Act 2001  
- Section 325 Education Act 1989  
To provide evidence should the school need to take or defend legal action relating to the policy – refer to:  
- Section 4 Limitation Act 1950 |
<table>
<thead>
<tr>
<th>No</th>
<th>Financial Record</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.6</td>
<td>Major audit reports and responses to major audits/ reviews, where there is evidence of fraud, wrongdoing etc</td>
<td>Discretionary audits carried out by the Office of the Auditor General</td>
<td>Keep indefinitely</td>
<td>Of archival value and required by Archives NZ – refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>School’s response to discretionary audit findings</td>
<td>May be sent to Archives NZ after 10 years (not sooner)</td>
<td>• Section 21 Public Records Act 2005</td>
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<td></td>
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<td></td>
<td>Must be sent to Archives NZ after 25 years, unless arrangements are made with Archives NZ for the school to keep them longer</td>
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<td></td>
<td>If 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</td>
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</tr>
<tr>
<td>4.7</td>
<td>Routine audit reports</td>
<td>Annual audit report</td>
<td>Keep for 7 years after the date of the last action, then the records may be destroyed with the permission of the board of trustees</td>
<td>For audit purposes – refer to:</td>
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<tr>
<td></td>
<td></td>
<td>Routine/non-controversial IRD or Education Review Office audits</td>
<td>If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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</td>
<td>• Sections 15 &amp; 16 Public Audit Act 2001</td>
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<td></td>
<td>• Section 325 Education Act 1989</td>
</tr>
<tr>
<td>No</td>
<td>Financial Record</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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</tr>
</tbody>
</table>
| 4.8 | Serious fraud and theft within the school management or staff structure | Major fraud  
Major theft  
Serious negligence  
Major misappropriation | 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  
If 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 | Of archival value and required by Archives NZ – refer to:  
• Section 21 Public Records Act 2005 |
| 4.9 | Minor fraud and theft within the school management or staff structure | Minor fraud  
Minor misappropriation  
Minor negligence  
Petty theft  
Small over claims on expenses | Keep for 7 years after the date of the last action, then the records may be destroyed with the permission of the board of trustees  
If the school is closing, the board/residual agent will arrange for a final audit of the accounts to be completed. 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 | For audit purposes – refer to:  
• Sections 15 & 16 Public Audit Act 2001  
• Section 325 Education Act 1989  
To provide evidence should the school need to take or defend legal action relating to the fraud or theft – refer to:  
• Section 4 Limitation Act 1950 |
School Records – Retention / Disposal Schedule

5. Property and Administration

This covers records relating to the acquisition, management, maintenance and disposal of property and equipment owned, occupied or controlled by the school, teaching materials and routine administration records.

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. For integrated school sites, some records relating to land ownership, building plans and property maintenance will be the property of the proprietor. Where this applies, the records are retained by the proprietor and not transferred to Archives New Zealand.

<table>
<thead>
<tr>
<th>No</th>
<th>School Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.1</td>
<td>Land ownership and/or occupancy documentation (excludes property owned by the Crown (Ministry))</td>
<td>Property occupancy document (POD) Deeds of title Certificates of title</td>
<td>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 If 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</td>
<td>Of archival value and required by Archives NZ – refer to: • Section 21 Public Records Act 2005</td>
</tr>
<tr>
<td>5.2</td>
<td>Lease agreements</td>
<td>Leases of land Leases of buildings Leases with other occupants of school property</td>
<td>Keep for 12 years after termination of the lease, then the records may be destroyed with the 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 12 year period expires</td>
<td>To provide evidence should the school need to take or defend legal action relating to the lease – refer to: • Section 7 Limitation Act 1950 Compliance with legislation – refer to: • Section 22 Tax Administration Act 1994</td>
</tr>
<tr>
<td>School Records</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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<tr>
<td>5.3 Occupancy licences</td>
<td>Licences with other occupants of school property, such as school dental clinics</td>
<td>Keep for 7 years after termination of the licence, then the records may be destroyed with the permission of the board of trustees</td>
<td>To provide evidence should the school need to take or defend legal action relating to the licence – refer to:</td>
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<td>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</td>
<td>• Section 4 Limitation Act 1950</td>
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<td>Compliance with legislation – refer to:</td>
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<td></td>
<td>• Section 22 Tax Administration Act 1994</td>
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<tr>
<td>5.4 Equipment leases</td>
<td>Photocopiers, Laptops, IT equipment, Audiovisual equipment</td>
<td>Keep for 7 years after termination of the lease, then the records may be destroyed with the permission of the board of trustees</td>
<td>To provide evidence should the school need to take or defend legal action relating to the lease – refer to:</td>
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<td>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</td>
<td>• Section 4 Limitation Act 1950</td>
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<td>Compliance with legislation – refer to:</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>• Section 22 Tax Administration Act 1994</td>
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<tr>
<td>5.5 Building plans for major building work, historical buildings or those with significant architectural merit, including project files for property projects</td>
<td>Major new permanent buildings, Major alterations, Restoration (or demolition) work on historical buildings, such as 19th century buildings or those with an Historic Places Trust rating, Buildings that have won a major architectural award</td>
<td>Keep indefinitely May be sent to Archives NZ 10 years after the year in which the work took place (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 If 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</td>
<td>To provide evidence should the school need to take or defend legal action relating to the building work – refer to:</td>
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<td>• Section 393 Building Act 2004</td>
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<td>Of archival value and required by Archives NZ – refer to:</td>
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<td>• Section 21 Public Records Act 2005</td>
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<td>No</td>
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<td>Examples</td>
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<td>Reasons</td>
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<td>5.6</td>
<td>Routine building plans, (including property files for property projects)</td>
<td>Minor repairs or alterations Installation of relocatables</td>
<td>Keep for 10 years after the year in which the work took place, then they may be destroyed with the permission of the board of trustees</td>
<td>To provide evidence should the school need to take or defend legal action relating to the building work – refer to: • Section 393 Building Act 2004</td>
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<td>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 10 year period expires</td>
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<tr>
<td>5.7</td>
<td>Property maintenance</td>
<td>Five Year Property Programme (5YP) Documentation and correspondence about the upkeep, repair and servicing of land and buildings Guarantees Inspections Warrants of fitness</td>
<td>Keep for 7 years after the date of the last action, or expiry of a guarantee or warrant of fitness, then the records may be destroyed with the permission of the board of trustees</td>
<td>To provide evidence should the school need to take or defend legal action relating to the work – refer to: • Section 4 Limitation Act 1950 Compliance with legislation – refer to: • Section 22 Tax Administration Act 1994</td>
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<td>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</td>
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<tr>
<td>5.8</td>
<td>Disposal of major capital assets (excludes property owned by the Crown (Ministry))</td>
<td>Sales agreements Asset transfer agreements Correspondence documenting the sale, transfer, disposal and/or write-off of buildings and land</td>
<td>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</td>
<td>Of archival value and required by Archives NZ – refer to: • Section 21 Public Records Act 2005</td>
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<tr>
<td>No</td>
<td>School Records</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
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<td>5.9</td>
<td>Stores, supplies, fixtures and, fittings (such as furniture, furnishings, floor coverings, etc.), and plant/equipment administration (includes records documenting procurement, installation, maintenance, storage, issue and disposal)</td>
<td>Order books, Asset registers, Inventories, Stationery issues, Delivery dockets, Library purchases</td>
<td>Keep for 7 years after the end of the income year to which the records relate (or 10 years if the IRD has advised of a pending audit before the 7 year period expires), then they may be destroyed with the 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.</td>
<td>Compliance with legislation – refer to: • Section 75 Goods and Services Tax Act 1985</td>
</tr>
<tr>
<td>5.10</td>
<td>Vehicles (including records relating to the purchase, hire, maintenance, service operation and disposal of school vehicles)</td>
<td>Vehicle log books, Purchase agreements, Sale agreements</td>
<td>Keep for 7 years after the date of last action, or 7 years after the vehicle is disposed of, then the records may be destroyed with the 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.</td>
<td>Compliance with legislation – refer to: • Section 75 Goods and Services Tax Act 1985</td>
</tr>
<tr>
<td>5.11</td>
<td>Major contracts incurring significant expenditure of operational and/or capital funding and relating to significant events in the life of a school</td>
<td>Contracts with architects, and builders for major building works (constructions, additions, demolitions, and facilities enhancements), Major IT projects/ enhancements</td>
<td>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. If 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.</td>
<td>Of archival value and required by Archives NZ – refer to: • Section 21 Public Records Act 2005</td>
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<tr>
<td>No</td>
<td>School Records</td>
<td>Examples</td>
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<td>Reasons</td>
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<tr>
<td>5.12</td>
<td>Routine contracts and agreements</td>
<td>Computer licences, Copyright licences, Cleaning contracts, Security contracts, Contracts with movers, Painting contracts, Lift maintenance, Caretaking contracts</td>
<td>Keep for 7 years after the year in which the contract ends, then the records may be destroyed with the 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</td>
<td>To provide evidence should the school need to take or defend legal action relating to the contract or agreement – refer to: • Section 4 Limitation Act 1950 For audit purposes – refer to: • Sections 15 &amp; 16 Public Audit Act 2001</td>
</tr>
<tr>
<td>5.13</td>
<td>Tender reports, describing the tender process and the reasons for selecting the successful tenderer</td>
<td>Tender reports</td>
<td>Keep for 7 years after the date of the last action, then the records may be destroyed with the 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</td>
<td>To provide evidence should the school need to take or defend legal action relating to the tender process or the resulting contract or agreement – refer to: • Section 4 Limitation Act 1950 For audit purposes – refer to: • Sections 15 &amp; 16 Public Audit Act 2001</td>
</tr>
<tr>
<td>5.14</td>
<td>Tender documentation</td>
<td>Administration of the tender process, Tenders of unsuccessful bidders</td>
<td>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 if the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
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</tbody>
</table>

41 SCHOOL RECORDS FACT SHEET CREATING, USING AND MAINTAINING RECORDS
<table>
<thead>
<tr>
<th>No</th>
<th>School Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
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</thead>
<tbody>
<tr>
<td>5.12</td>
<td>Routine contracts and agreements</td>
<td>Computer licences</td>
<td>Keep for 7 years after the year in which the contract ends, then the records may be destroyed with the permission of the board of trustees</td>
<td>To provide evidence should the school need to take or defend legal action relating to the contract or agreement – refer to:</td>
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<tr>
<td></td>
<td></td>
<td>Copyright licences</td>
<td></td>
<td>• Section 4 Limitation Act 1950</td>
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<td></td>
<td></td>
<td>Cleaning contracts</td>
<td></td>
<td>For audit purposes – refer to:</td>
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<td></td>
<td>Security contracts</td>
<td></td>
<td>• Sections 15 &amp; 16 Public Audit Act 2001</td>
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<td>Contracts with movers</td>
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<td>Painting contracts</td>
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<td>Lift maintenance</td>
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<td>Caretaking contracts</td>
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<td>Keep for 7 years after the date of the last action, then the records may be destroyed with the permission of the board of trustees</td>
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<td></td>
<td></td>
<td>Tender reports</td>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>Tender reports, describing the tender process and the reasons for selecting the successful tenderer</td>
<td>Tender reports</td>
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<td>To provide evidence should the school need to take or defend legal action relating to the tender process or the resulting contract or agreement – refer to:</td>
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<td></td>
<td>• Section 4 Limitation Act 1950</td>
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<td>For audit purposes – refer to:</td>
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<td></td>
<td></td>
<td></td>
<td>• Sections 15 &amp; 16 Public Audit Act 2001</td>
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<tr>
<td></td>
<td>Tender documentation</td>
<td>Administration of the tender process</td>
<td>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</td>
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<td></td>
<td>Tenders of unsuccessful bidders</td>
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<td>If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
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<tr>
<td>No</td>
<td>School Records</td>
<td>Examples</td>
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<tr>
<td>5.15</td>
<td>Routine administration</td>
<td>Minutes of staff, departmental, school functions committees, or student council meetings</td>
<td>Keep for as long as the school needs them for administration or reference purposes, then these records may be:</td>
<td>• discharged into the care of an individual or organisation, with the permission of the board; or</td>
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<td>School camp records</td>
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<td>• destroyed with the permission of the board of trustees</td>
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<td>Fire evacuation plans/procedures</td>
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<td>If the school is closing, these records may be discharged or destroyed with the permission of the board of trustees/residual agent</td>
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<tr>
<td></td>
<td></td>
<td>Routine daily notices</td>
<td></td>
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<tr>
<td>5.16</td>
<td>Teaching materials</td>
<td>Work books</td>
<td>Keep for as long as needed for school business or reference purposes, then they may be destroyed with the permission of the teacher and/or the board of trustees as applicable</td>
<td>If a school is closing, these records may be destroyed with the permission of the board of trustees/residual agent, in consultation with individual teachers where required</td>
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<td></td>
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<td>Unit plans</td>
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<td>Notes</td>
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</table>
### Historical Records

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.

### Historical Records Table

<table>
<thead>
<tr>
<th>No</th>
<th>Historical Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
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</thead>
</table>
| 6.1 | Photographs recording significant events/milestones in the history 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 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  
If a 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 | Of archival value and required by Archives NZ – refer to:  
- Section 21 Public Records Act 2005 |
<table>
<thead>
<tr>
<th>No</th>
<th>Historical Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.2</td>
<td>Other photographs</td>
<td>Class, staff, department, sports team, and cadets photos</td>
<td>Keep for as long as the school needs them for administration or reference purposes, then these records may be:</td>
<td>Compliance with legislation – refer to:</td>
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<td>Prize givings</td>
<td>• discharged into the care of an individual or organisation, with the permission of the board; or</td>
<td>• Section 25 Public Records Act 2005 (discharged records)</td>
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<td>Educational activities (education outside classrooms, school camps, international students activities, etc.)</td>
<td>• destroyed with the permission of the board of trustees</td>
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<td></td>
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<td>Class trips abroad (e.g. Gallipoli)</td>
<td>Do not transfer the records to another school, or an “approved repository” such as a museum, library or historical society, without making prior arrangements with Archives NZ</td>
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<td></td>
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<td>Sports events</td>
<td>If the school is closing, these records may be discharged or destroyed with the permission of the board of trustees/residual agent</td>
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<td>Social events</td>
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<td>Musical/stage productions</td>
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<td>Reunions</td>
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<td>Church services</td>
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<td>Photos taken for routine operational or administrative purposes (inventories of furniture, damage to fittings, etc.)</td>
<td></td>
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</tr>
<tr>
<td>6.3</td>
<td>Major school productions</td>
<td>Annual yearbooks/magazines</td>
<td>Keep indefinitely</td>
<td>Of archival value and required by Archives NZ – refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Prospectuses</td>
<td>May be sent to Archives NZ after 10 years (not sooner)</td>
<td>• Section 21 Public Records Act 2005</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Newsletters relating to significant milestones/events in the history of the school</td>
<td>Must be sent to Archives NZ after 25 years, unless arrangements are made with Archives NZ for the school to keep them longer</td>
<td>Compliance with legislation – refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Need not be sent to Archives NZ if the school has deposited a copy with the National Library</td>
<td>• Section 31 National Library of New Zealand Act 2003 (legal deposit of publications)</td>
</tr>
<tr>
<td>No</td>
<td>Historical Records</td>
<td>Examples</td>
<td>Action</td>
<td>Reasons</td>
</tr>
<tr>
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</tr>
<tr>
<td>6.4</td>
<td>Routine newsletters, circulars, etc.</td>
<td>Staff, students, parents/ carers newsletters/notices</td>
<td>Keep for as long as the school needs them for administration or reference purposes, then these records may be:</td>
<td>Compliance with legislation – refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Newsletters/notices about routine school programmes, activities and events</td>
<td>• discharged into the care of an individual or organisation, with the permission of the board; or</td>
<td>• Section 25 Public Records Act 2005 (discharged records)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• destroyed with the permission of the board of trustees</td>
<td></td>
</tr>
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<td></td>
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<td></td>
<td>Do not transfer the records to another school, or an “approved repository” such as a museum, library or historical society without making prior arrangements with Archives NZ</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If the school is closing, these records may be discharged or destroyed with the permission of the board of trustees/residual agent</td>
<td></td>
</tr>
<tr>
<td>6.5</td>
<td>Newspaper clippings/collections relating to the school, staff and/or students (past or present)</td>
<td>Scrapbooks of newspaper clippings</td>
<td>Keep for as long as the school needs them for administration or reference purposes, then these records may be:</td>
<td>Compliance with legislation – refer to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• discharged into the care of an individual or organisation, with the permission of the board; or</td>
<td>• Section 25 Public Records Act 2005 (discharged records)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• destroyed with the permission of the board of trustees</td>
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<td></td>
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<td>Do not transfer the records to another school, or an “approved repository” such as a museum, library or historical society without making prior arrangements with Archives NZ</td>
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</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent</td>
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</tr>
</tbody>
</table>
### Historical Records

<table>
<thead>
<tr>
<th>No</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.6</td>
<td>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 the designated character of a school established under section 156 of the Education Act 1989).</td>
<td>Keep indefinitely</td>
<td>Of archival value and required by Archives NZ – refer to:</td>
</tr>
<tr>
<td></td>
<td>School histories</td>
<td>May be sent to Archives NZ after 10 years (not sooner)</td>
<td>• Section 21 Public Records Act 2005</td>
</tr>
<tr>
<td></td>
<td>Recorded oral histories</td>
<td>Must be sent to Archives NZ after 25 years, unless arrangements are made with Archives NZ for the school to keep them longer</td>
<td>Compliance with legislation – refer to:</td>
</tr>
<tr>
<td></td>
<td>Ceremonial occasions (appointment of principals, visiting dignitaries etc)</td>
<td>Need not be sent to Archives NZ if the school has deposited a copy with the National Library</td>
<td>• Section 31 National Library of New Zealand Act 2003 (legal deposit of publications)</td>
</tr>
<tr>
<td></td>
<td>Jubilees</td>
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<tr>
<td></td>
<td>Major sports tournaments</td>
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<tr>
<td></td>
<td>Major awards</td>
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<td></td>
<td>Retirement of long-serving staff</td>
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<td></td>
<td>Visits from famous former staff or students</td>
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<td></td>
<td>Major new building and/or restoration work</td>
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<td></td>
<td>Significant bequests, donations etc</td>
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</tr>
</tbody>
</table>

<p>| 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 | Keep for as long as the school needs them for administration or reference purposes, then these records may be: | Compliance with legislation – refer to: |
| | Prize givings | • discharged into the care of an individual or organisation, with the permission of the board; or | • Section 25 Public Records Act 2005 (discharged records) |
| | Sports events | • destroyed with the permission of the board of trustees | |
| | Social occasions | | |
| | Musical/stage productions | | |
| | House activities | | |
| | Reunions | | |</p>
<table>
<thead>
<tr>
<th>No</th>
<th>Historical Records</th>
<th>Examples</th>
<th>Action</th>
<th>Reasons</th>
</tr>
</thead>
</table>
| 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  
Do not transfer the records to another school, or an “approved repository” such as a museum, library or historical society without making prior arrangements with Archives NZ  
If the school is closing, these records may be destroyed with the permission of the board of trustees/residual agent |
List of contacts

Archives New Zealand Offices
Archives New Zealand Website: www.archives.govt.nz

WELLINGTON HEAD OFFICE
Address: 10 Mulgrave Street
Thorndon
Wellington
PO Box 12-050
Phone: (04) 499 5595
Email: general.enquiries@dia.govt.nz

AUCKLAND REGIONAL OFFICE
Address: 525 Mt Wellington Highway
Auckland
PO Box 91-220
Phone: (09) 270 1100
Email: auckland.archives@dia.govt.nz

CHRISTCHURCH REGIONAL OFFICE
Address: 90 Peterborough Street
Christchurch
PO Box 642
Phone: (03) 377 0760
Email: christchurch.archives@dia.govt.nz

DUNEDIN REGIONAL OFFICE
Address: 556 George Street
Dunedin
PO Box 6183
Phone: (03) 477 0404
Email: dunedin.archives@dia.govt.nz

DEPARTMENTAL ENQUIRIES
Recordkeeping enquiries: rkadvice@dia.govt.nz
Preservation enquiries: archivepreservation@dia.govt.nz

Ministry of Education Offices
Ministry of Education Website: www.education.govt.nz

NATIONAL OFFICE
Address: Ministry of Education
Mātauranga House
33 Bowen St
Wellington
PO Box 1666
Thorndon
Wellington
Phone: (04) 463 8000
Email: enquiries.national@education.govt.nz

WHANGAREI OFFICE
Address: The Money Factory
10 Awaroa River Road
Onerahi
PO Box 911
Whangarei 0140
Northland
Phone: (09) 436 8900
Email: enquiries.whangarei@education.govt.nz

AUCKLAND OFFICE
Address: Eden 5, 12-18 Normanby Road
Mt Eden
Private Bag 92644, Symonds Street
Auckland 1150
Phone: (09) 632 9400
Email: enquiries.auckland@education.govt.nz

HAMILTON OFFICE
Address: 18 Home St
Te Rapa
Hamilton
Phone: (07) 850 8880
Email: enquiries.hamilton@education.govt.nz
Rotorua Office
Address: Level 3
1144 Pukaki Street
PO Box 1749
Rotorua
Phone: (07) 349 7399
Email: enquiries.rotorua@education.govt.nz

Napier Office
Address: 8A Lever Street
Ahuriri
Napier
PO Box 147
Napier
Phone: (06) 833 6730
Email: enquiries.napier@education.govt.nz

Gisborne Office
Address: 42 Grey Street
Gisborne
Private Bag 658
Gisborne 4040
Phone: (06) 833 6730
Email: enquiries.napier@education.govt.nz

Taranaki/ Wanganui/ Manawatu Office
Address: 93 Ingestre Street
Wanganui
Private Bag
Wanganui
Phone: (06) 349 6300
Email: enquiries.wanganui@education.govt.nz

Lower Hutt Office
Address: 19 Market Grove
PO Box 30177
Lower Hutt 5040
Phone: (04) 463 8699
Email: enquiries.wellington@education.govt.nz

Nelson/ Marlborough/ West Coast Office
Address: 19 Haven Rd
Nelson
PO Box 282
Nelson
Phone: (03) 546 3470
Email: enquiries.nelson@education.govt.nz

Christchurch Office
Address: 39 Princess Street
Addington
Christchurch
P O Box 2522
Christchurch
Phone: (03) 378 7300
Email: enquiries.christchurch@education.govt.nz

Otago/ Southland Office
Address: 414 Moray Place
Dunedin
Private Bag 1971
Dunedin 9054
Phone: (03) 471 5200
Email: enquiries.dunedin@education.govt.nz

Invercargill Office
Address: 190 Forth Street
Invercargill
PO Box 882
Invercargill 9840
Phone: (03) 211 3610
Email: enquiries.invercargill@education.govt.nz

New Zealand School Trustees Association
NZSTA Website: www.nzsta.org.nz
Address: Level 8 – 142
Lambton Quay
Wellington
PO Box 5123
Wellington
Phone: (04) 473 4955
Helpdesk: 0800 782 435
Email: helpdesk@nzsta.org.nz