School
Dunedin Rudolf Steiner
Learning with head, heart and hands

RECORDS RETENTION PROCEDURE

PURPOSE

To ensure that the school follows the legal requirements regarding the retention of school records, so that records are kept safety in a manner that protects the records and respects privacy. The procedure also outlines the Board's approach to the retention of records where there is flexibility on how long the records may be kept for.

The School Board is accountable for ensuring the school follows the guidance provided in the Ministry of Education's information pack "School Records Retention and Disposal"[1]. The school's management are responsible for following the procedures and for ensuring that staff are aware of the requirements. The procedure should also be read in conjunction with the policy on Privacy of Information. See the appendix for a list of where records are filed.

ITEMS THAT NEED TO BE PERMANENTLY ARCHIVED

Items that need to be archived permanently will be sent to the Hocken Library. These items include:-

- School Board minutes

ITEMS WHERE THE BOARD HAS DISCRETION OVER DISPOSAL DATE

STUDENT RECORDS

- All records to be kept in accordance with Records and Retention schedule
- Student progress records (test results, reports, health records) will be destroyed one year after the student leaves unless there is good reason to believe that the student will return to the school.
- Student's own work will be returned to the student.
- Test papers will be destroyed at the end of the year after which the test took place.

ROUTINE SCHOOL POLICIES PLANS AND PROCEDURES

- Once a school policy or procedure has been superseded by a new version then the old version can be disposed of
- Operational plans, annual plans can be disposed of after 5 years except for those which are reported on to the Ministry of Education
- Routine correspondence that does not fall into the "Records and Retentions Schedule" point 2.6 or 2.7 (ie significant, complaints, elections, closures) will be kept for 7 years and then destroyed

PERSONNEL RECORDS

- May be destroyed after 7 years unless required to be kept by the "School Records Retention and Disposal" Schedule

[1] Filed in the main school office filing cabinet and available on the MoE website

ACCOUNTING RECORDS

- May be destroyed after 7 years unless required to be kept by the "School Records Retention and Disposal" Schedule

All other areas where there is discretion for the School Board, the items ready for destruction will be decided on by the School Board.

EFFECTIVENESS REVIEW

This procedure will be reviewed according to the Board's self -review timetable and the parent community will be informed of this.

Signed..... Date.11.8.2026

Principal Anna Noble Date to be reviewed : 10.8.2029

Appendix – where records are filed - Primary school

Student records
Each student has a central file kept in the locked filing cabinet in the main office. The file should contain:-

- Enrolment form, copy of birth certificate
- Correspondence about time off, health and other matters
- Confidential matters
- Mid year and end of year reports are only filed electronically on the shared system

Assessment information is filed class by class electronically on the shared files and on the Student Management System. Emergency contact details for staff and students are kept in a file in the main office.

Class records

- Planning – kept by the class teacher.
- Risk Analysis Management forms and permission slips filed in the RAMS folder on the school drive (during the expedition the teacher in charge will take a copy of the RAMs form for all helpers, and copies of the children's contact details from the permission slips)

Personnel files
Each member of staff has a file kept in a locked filing cabinet. These contain contract information, records of absences, contractual changes, job descriptions etc

Access to records
Central filing cabinet in main office – all members of staff can access during office hours.
Personnel filing cabinet – keys held by Management Team members and administrator.