



# **Appraisal Report for Ministry of Education**

Prepared by the Ministry of Education

VERSION 2

February 2005

# Table of Contents

<b>1</b>	<b>CONTACT INFORMATION</b> .....	<b>3</b>
1.1	AGENCY NAME .....	3
<b>2</b>	<b>AGENCY INFORMATION</b> .....	<b>4</b>
2.1	MINISTRY OF EDUCATION .....	4
2.2	RESIDUAL MANAGEMENT UNIT, DEPARTMENT OF EDUCATION, HEAD OFFICE.....	4
2.3	EDUCATION BOARDS.....	4
2.4	DEPARTMENT OF EDUCATION, HEAD OFFICE .....	5
2.5	BOARD OF STUDIES .....	5
2.6	MAORI EDUCATION FOUNDATION.....	6
2.7	PACIFIC ISLANDS POLYNESIAN EDUCATION FOUNDATION.....	7
2.8	VOCATIONAL TRAINING COUNCIL.....	7
2.9	INFORMATION TECHNOLOGY EDUCATION AUTHORITY.....	7
<b>3</b>	<b>INTRODUCTION AND BACKGROUND INFORMATION</b> .....	<b>9</b>
3.1	CONSULTATION .....	9
3.2	PREVIOUS APPRAISAL DECISIONS FOR THIS AGENCY.....	10
3.3	SCOPE OF APPRAISAL.....	10
3.4	METHODOLOGY.....	11
3.4.1	<i>The approach</i> .....	11
3.4.2	<i>Appraisal criteria</i> .....	11
3.5	POINTS OF INTEREST IN THE APPRAISAL.....	12
3.5.1	<i>Records from Many Agencies</i> .....	12
3.5.2	<i>Missing records from W4262</i> .....	12
3.5.3	<i>Empty files</i> .....	12
3.5.4	<i>Publications</i> .....	12
3.5.5	<i>Linear metres</i> .....	12
3.5.6	<i>Maori Education Foundation Records</i> .....	12
3.6	REFERENCES USED .....	13
3.7	LEGISLATION REFERRED TO.....	13
3.8	EXPLANATORY NOTES FOR THE LISTS .....	13
3.8.1	<i>Worksheet title details used in the spreadsheet</i> .....	13
3.8.2	<i>Use of red text in list</i> .....	14
3.8.3	<i>Use of yellow highlight in list</i> .....	14
3.8.4	<i>Use of orange column in the worksheets</i> .....	14
<b>4</b>	<b>RECORDS DESCRIPTION AND EVALUATION</b> .....	<b>15</b>
4.1	RESEARCH AND STATISTICAL RECORDS .....	15
4.2	FINANCIAL RECORDS .....	17
4.3	MAORI EDUCATION FOUNDATION, NGARIMU VC AND 28 <sup>TH</sup> (MAORI) BATTALION MEMORIAL SCHOLARSHIP FUND BOARD AND THE PACIFIC ISLANDS POLYNESIAN EDUCATION FOUNDATION RECORDS .....	19
4.4	INTERNATIONAL EDUCATION AND ISLANDS EDUCATION, DEPARTMENT OF EDUCATION FILE SERIES21	
4.5	VOCATIONAL TRAINING COUNCIL AND ITEA: INFORMATION TECHNOLOGY EDUCATION AUTHORITY .....	23
4.6	LEGAL RECORDS .....	24
4.7	SCHOOL PROPERTY RECORDS .....	25
4.8	MINISTERIAL RECORDS .....	26
4.9	BOARD OF STUDIES .....	27
4.10	PUBLICATIONS.....	28
4.11	CLOSED SCHOOL RECORDS.....	30
4.12	EARLY CHILDHOOD EDUCATION .....	30
4.13	SPECIAL EDUCATION.....	32
4.14	SCHOOL - FURNITURE, EQUIPMENT , BREAKING AND ENTRY, CARETAKING AND VANDALISM .....	33
4.15	ADMINISTRATION (INCLUDING ACCOMMODATION, EQUIPMENT, INFORMATION TECHNOLOGY AND INFORMATION MANAGEMENT).....	34
4.16	ACCESS TRAINING.....	35
4.17	CURRICULUM .....	36
4.18	PERSONAL FILES TEACHERS AND DEPARTMENTAL STAFF.....	36
4.19	STAFFING AND EMPLOYEE RECORDS, TERTIARY, PRIMARY, SECONDARY, TEACHERS, EXAMINATIONS AND ASSORTED DEPARTMENTAL RECORDS .....	37
<b>5</b>	<b>DISPOSAL ACTIONS</b> .....	<b>39</b>
<b>7</b>	<b>QUANTITIES FOR RETENTION AND DESTRUCTION</b> .....	<b>40</b>
<b>8</b>	<b>APPENDICES</b> .....	<b>41</b>

# **1 Contact Information**

## **1.1 Agency name**

The Ministry of Education

National Office

45-47 Pipitea Street

P.O. Box 1666

Thorndon

Wellington

## 2 Agency Information

Agency information is provided for 9 agencies as the records offered for appraisal were either created, or in the custody of one or more of these agencies:

1. Ministry of Education (the transferring agency)
2. Residual Management Unit, Department of Education, Head Office
3. Education Boards
4. Department of Education, Head Office
5. Board of Studies
6. Maori Education Foundation
7. Pacific Islands Polynesian Education Foundation
8. Vocational Training Council
9. Information Technology Education Authority

### 2.1 Ministry of Education

The Ministry of Education was established on 1 October 1989. The primary functions of the Ministry are to:

- Give policy advice to the Government on all aspects of education.
- Implement Government policy, effectively, efficiently and equitably.
- Advise on best possible use of the resources allocated to education.
- Provide an education policy perspective to a range of economic and social policy issues.

Archives New Zealand GAIMS Agency documentation for the Ministry of Education is appended.

### 2.2 Residual Management Unit, Department of Education, Head Office

With the disestablishment of the Department of Education, Education Boards and the establishment of the Ministry, provision was made through legislation for the set up of a Residual Management Unit. The Education Residual Management Unit was established on 1 October 1989. The role of this unit was to:

- Administer the Education Act 1964 and associated legislation/regulations.
- Wind up the affairs of the Department of Education and the Education Boards.

Archives New Zealand GAIMS Agency documentation for the Residual Management Unit is appended.

### 2.3 Education Boards

Education Boards were established in Auckland 1857 - 1989, Hamilton 1953 - 1989, Hawke's Bay 1878 - 1989, Taranaki 1868 - 1989, Wanganui 1878 - 1989, Wellington 1872 - 1989, Nelson 1856 - 1989, Canterbury 1916 - 1989, Otago 1856 - 1989, Southland 1878 - 1989.

The Education Boards were set up to:

- Establish, maintain and control the state primary, intermediate, special, area and secondary schools, which had been placed under their control.
- Appoint teachers.
- Arrange school transport.
- Establish school districts.
- Supply books, furniture, equipment and materials.
- Establish school committees.

The Boards were responsible to the Department of Education for:

- Maintenance of building and equipment.
- School committee incidental expenses.
- Salaries for teachers and incidental staff.
- Develop plans for buildings, grounds and maintenance works, not only for themselves, but also for other educational institutions. Let and supervise such contracts.

No Archives New Zealand GAIMS Agency documentation was available for the Residual Management Unit, Otago Education Board, or the Otago Education Board, the two primary Education Board agencies whose records are being offered in this appraisal.

#### **2.4 Department of Education, Head Office**

The Department of Education was established 1877-1989. The head office was divided into five major areas of responsibility (Administration, Policy and Resources, Schools and Operations, Schools Development and Tertiary) each headed by an Assistant Secretary. Assistant Secretaries were responsible for supervision of their own directorates, and for overall co-ordination of the department's work. The three Regional Superintendents (Northern, Central and Southern) were responsible for all the department's activities in their regions.

The primary functions of the Department were to:

- Administer the Education Act 1964 and associated legislation/regulations under the control of the Minister of Education.
- Administer the Government's policy for the maintenance and development of education.
- Ensure that education standards are maintained throughout the country.
- Act as an agency for the distribution of Government funds.

Archives New Zealand GAIMS Agency documentation for the Department of Education is appended.

#### **2.5 Board of Studies**

With the removal of University Entrance from the sixth form, the Six Form Certificate became the official leaving award for the sixth form. To support the greater prominence accorded the Sixth Form Certificate the department initiated a comprehensive publicity campaign in the second half of 1985 designed to provide information on this award to students, school staff, parents, employers and the general public. In looking ahead to the co-ordination of the curriculum and of the awards in the secondary school, the Committee of Inquiry (into Curriculum, Assessment and Qualifications in Forms 5 to 7) advocated in its report the establishment of a "Secondary" Board of Studies with various functions related to secondary education. Until a Board was established, the Committee of Inquiry acted as an Interim Board of Studies for the provision of continuing advice.

In July 1987 the Education Amendment Act No. 2 was passed establishing the Board of Studies. The Board of Studies was disestablished in 1989. The School Certificate Examination Board and the Interim Board of Studies were disbanded in 1987.

The primary functions of the Board were to consider and make recommendations to the Minister concerning:

- The secondary curriculum and secondary syllabuses and guidelines; and
- The assessment of secondary students; and

- Awards that are or may be made to secondary students, and the subjects and prescriptions for those awards.

In performing its general function, the board may –

- Consider any matter relating to secondary education:
- Recommend action to maintain or improve standards of secondary education:
- Consult with any person or organization it thinks fit:
- Initiate and consider research or development relating to secondary education.

No Archives New Zealand GAIMS Agency documentation exists for this Board which was the forerunner to the NZQA: New Zealand Qualification Authority.

## **2.6 Maori Education Foundation**

The Maori Education Foundation was established in 1961 and operated to 1993. The Department of Education and subsequently the Ministry of Education administered the Maori Education Foundation. In 1990 The Ministry of Education, Te Wahanga Maori division administered the Maori and Polynesian Scholarship Regulations; Ngarimu VC and 28<sup>th</sup> (Maori) Battalion Memorial Scholarship Fund Board Act 1945, and the Maori Education Foundation Act 1961.

The Maori Education Foundation was an autonomous statutory body and had its own funding. The structure included a Board of Trustees. Ministry of Education employees carried out the Secretariat functions of the Foundation. The same Secretariat also provided administration services for the Pacific Islands Polynesian Education Foundation. Two selection committees operated to consider applications for financial assistance in the areas of secondary and tertiary education.

The primary functions of the Foundation were to

- Promote and encourage the better education of Maori people.
- To provide financial assistance for that purpose.

This covered

- Education and vocational training of Maoris;
- The granting of financial assistance or of equipment to schools and institutions at which Maoris were receiving education;
- The provision of bursaries to assist Maoris attending post-primary schools or any New Zealand or overseas university, agricultural college, or institution of similar status;
- The provision of post-graduate scholarships for Maoris holding university degrees or diplomas;
- And making of special research or study grants to Maoris undertaking special research or study projects.

And by 1988 funding also included

- Grants for pre-school groups and the employment of a pre-school officer.
- Sponsorship of four annual speech contests.
- Grants to secondary school pupils.

In 1993 the Maori Education Act 1961 was repealed and replaced by the Maori Education Trust Deed. One of the Trusts core activities is to administer the Ngarimu VC and 28<sup>th</sup>

(Maori) Battalion Scholarships and essay competitions. The Ministry of Education contracts the Maori Education Trust to administer these scholarships.

No Archives New Zealand GAIMS Agency documentation exists for this Foundation.

### **2.7 Pacific Islands Polynesian Education Foundation**

The Foundation was established in 1972. The aims and objectives of the Foundation are similar in most respects to those of the Maori Education Foundation. The structure included a Board of Trustees. Ministry of Education employees carried out the Secretariat functions of the Foundation. The same Secretariat provided administration services for both the Pacific Islands Polynesian Education Foundation and the Maori Education Foundation.

The Ministry of Education still administers the Pacific Islands Polynesian Education Foundation Act 1972.

The primary functions of the Foundation were to:

- Promote and encourage the better education of Pacific Island students who reside permanently in New Zealand
- To provide financial assistance for that purpose.

No Archives New Zealand GAIMS Agency documentation exists for this Foundation.

### **2.8 Vocational Training Council**

The Vocational Training Council was set up by an Act of Parliament in 1968 and was established in 1969. From 1982 prime responsibility for the Vocational Training Council passed from the Minister of Education to the Minister of Labour. This was a result of a 1981 report by the NZ Planning Council and the findings of a committee set up by Government to review the functions of the Vocational Training Council and the Vocational Training Council Act 1982. The Department of Education continued to have a representative on all industry training boards.

In 1981 the advisory body (METAC) Micro Electronic Technology Training Committee was established to investigate how the NZ training environment would be affected by the introduction of technology. In 1985 the Information Technology Training Committee (ITTC) was established under Section 14 of the VTC Act in response to a request to the VTC from computer professionals for a more effective mechanism with which to co-ordinate and advice both teaching institutions and Government. On the 01-04-1988 the VTC approved the establishment of the (ITEA) the Information Technology Education Authority (see separate entry below)

The primary functions of the Council were to:

- Advise Government, educational and training institutions, and the various fields of industry, commerce and agriculture on developing needs for trained manpower of various kinds and on the types of vocational training that would be required to satisfy these needs.

Archives New Zealand GAIMS Agency documentation for the Vocational Training Council, Head Office is appended.

### **2.9 Information Technology Education Authority**

On the 1 April 1988 the (VTC) Vocational Training Council approved the establishment of the Information Technology Education Authority (ITEA). In March 1989 a constitution documents on file number 3/4 part 1 states that the name shall be New Zealand Information Technology Authority *Incorporated*. A document dated 18 May 1989 states that the authority is an independent organisation, which as a result of recent restructuring in the

Vocational Education and Training field has re-established under the incorporated Societies Act. And that the ITEA evolved from a number of advisory committees established under the Vocational Training Council.

The objectives for which the Authority is established are to:

- Promote systematic Vocational Education and Training (VET) for IT occupations.
- Act as the national co-ordinator for the development of VET policy as it affects IT occupations.
- Advise Government, industry and training providers on matters relating to IT VET.
- Provide information on Vocational Education Training.
- Conduct research applicable to the role of the Authority.
- Provide advice, information and a consultancy service for members of the Authority and others on a user pay basis.
- Consider any matter which in the view of the Authority is conducive to the advancement of VET for IT occupations.

No Archives New Zealand GAIMS Agency documentation exists for this Authority.



### 3 Introduction and Background Information

The Department of Education and the Education Boards were disestablished in 1989. The Ministry of Education (hereafter MoE) inherited responsibility for and custody of, several groups of records from the Residual Management Units, Education Boards and the Department of Education.

As well as those larger agencies, the Department of Education was responsible for a number of smaller functions/agencies in a secretariat role, for example the Maori Education Foundation and the Pacific Islands Polynesian Education Foundation. During this appraisal we have treated each of those smaller groups of records as coming from separate agencies (including the Vocational Training Council, Information Technology Education Authority) pending a decision by Archives New Zealand of their agency status prior to transfer.

From 1990 the Ministry has appraised various groups of records including but not limited to Department of Education, Head Office Records (Accession W4262), Teacher Personal files (Accession W4790), and Departmental staff personal files in June 2001.

In early 2003 the Ministry decided to continue its ongoing initiative to appraise its predecessor's records. The Ministry contracted the Flying Filing Squad to list to Archives NZ Standard the contents of approx. 3,000 boxes held at Recall. The decision to list to Archives New Zealand Standard was based on the belief that no content lists existed for these boxes. A content list was subsequently located for approx. 735 boxes of financial records which were appraised in phase 1 of this project.

In order to deal with the volume of boxes two appraisal projects were undertaken. This project therefore has been split into several phases. This report encompasses the records offered to Archives New Zealand as phase 2.

- **Phase 1:** Appraisal of financial records (approved by the Chief Archivist in October 2003).
- **Phase 2:** Appraisal of non-financial records (e.g. Residual Management Units, Staff personal files, Teacher personal files, Maori Education Foundation etc).
- **Phase 3:** Destruction and Transfer.

Before being implemented, Archives New Zealand must approve the appraisal recommendations through sign-off by the Chief Archivist.

#### 3.1 Consultation

Archives New Zealand staff were consulted during this appraisal for technical advice. A representative from Archives New Zealand also made an onsite visit to give advice on the listing process.

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In addition, current Ministry of Education staff and external information specialists were consulted in relation to the records described in the table below. The advice given by each of these individuals is reflected in the recommendations in this report.

Record type		Position
Property records		Manager Network Provision, Central South Region Management, National Operations Division Group Education Improvement & Support
Teacher		Senior Contracts Coordinator Payroll,

Superannuation files		Payroll and Contracts, Resourcing Division, Group Strategic Information & Resourcing  Manager Insurance Superannuation Unit, Government Actuary Team, Ministry of Economic Development
Ministerial and official correspondence records		Information Manager, Corporate Services Branch, Commerce Commission (Ex MoE)
Legal records		Manager, Legal Services, Strategic Development Group
Pacific Islands Polynesian Education Foundation records		Pule Maata Pasifika, Senior Manager National Operations, National Operations Division, Group Education Improvement & Support
Maori Education Foundation records		Group Manager Maori
Publications		Information Officer Library, Information Support Division, Group Information Systems
Reading and Literacy Study records Second Mathematical Study Records Pathways to Employment Project		Comparative Education Research Unit, Research Division, Group Strategic Information & Resourcing

### 3.2 Previous appraisal decisions for this agency

The Ministry of Education and the Department of Education have had a significant number of appraisals completed since 1989. The GAIMS Agency and Series documentation for all of the relevant organisations were consulted and confirm that none of the previous non-financial record appraisals have direct bearing on the records being offered for appraisal in this phase of the project. We therefore have not listed each previous appraisal.

The recent appraisal of financial records approved by the Chief Archivist in October 2003 has been used as precedent for financial records in this appraisal. This is because they essentially form part of the same appraisal project, they were just not included at that time as the boxes contained a mixture of financial and non-financial records, and therefore needed further assessment.

### 3.3 Scope of appraisal

This appraisal covers records of:

1. Ministry of Education (the transferring agency)
2. Residual Management Unit, Department of Education, Head Office
3. Education Boards
4. Department of Education, Head Office
5. Board of Studies
6. Maori Education Foundation
7. Pacific Islands Polynesian Education Foundation
8. Vocational Training Council

This group of records are being appraised as Phase 2 of the 2003 appraisal project.

### **3.4 Methodology**

#### **3.4.1 The approach**

The listing exercise carried out during this appraisal project identified and physically separated out the boxes containing solely financial material so this could be easily appraised as one group (Phase 1). This equated to 1764 boxes, which were approved for destruction in October 2003.

This left some 2000 boxes requiring more in depth appraisal. The lists for those boxes were arranged in broad series order to allow for appropriate list and physical file examination to take place.

Records from across all series were examined and file content analysis information gathered to:

- assist in the determination of appropriate recommendations
- to confirm the accuracy of the list

This equated to approximately 130 boxes of which approx. 600 files were physically examined. This is approximately 6.5% of the total records offered for appraisal.

#### **3.4.2. Appraisal criteria**

**The criteria for recommending the permanent retention of records as archives are that the records:**

- 1 Provide proof of a particular event or agreement, document the rights/legal interests/obligations of the Government, the Ministry of Education or its predecessor agencies, the citizens of New Zealand;
- 2 Provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency;
- 3 Document the performance of a substantive function of the creating agency;
- 4 Provide evidence of the development of public policy in the area of the Ministry of Education's substantive functions;
- 5 Document the financial accountability of the Ministry of Education, or the creating agency - its financial standing, obligations, and its conduct of financial affairs;
- 6 Provide evidence of the Ministry of Education's position or perspective on, or involvement in, significant national events or government initiatives;
- 7 Provide evidence of the Ministry of Education's interaction with outside groups and their influence on the development of policy and/or procedures;
- 8 Are of continuing administrative value to the successors to the functions of the creating agency;
- 9 Are 19th century records
- 10 Provide information that has research potential in the areas of genealogy, social policy, education policy, operation and development of the education system, education environment in New Zealand in general;
- 11 Provide information about a current or past event significant to the history of the country or to the Ministry of Education;
- 12 Provide information about persons of historical interest - persons important in New Zealand's social, educational or political history, or significant in the history of the Ministry of Education or its predecessors;
- 13 Complete, or complement and/or enhance records already held at Archives New Zealand;

## **The criteria for recommending the destruction of records are those records that:**

- 14 Concern routine administrative matters only;
- 15 Comprise material received for information only;
- 16 Are drafts and/or duplicates of other records;
- 17 Are published material;
- 18 Contain information summarised, more complete and/or more readily accessible in other records recommended for retention or elsewhere.

### **3.5 Points of interest in the appraisal**

#### **3.5.1 Records from Many Agencies**

The listing phase of this project highlighted the fact that the Ministry has inherited records from a number of different agencies. For the purposes of this appraisal it was decided to express the records in 9 agency groups. This has been done to assist Archives New Zealand with evaluation of this report and the attached lists, however, the final decision on whether each of these entities is actually a separate agency will need to be determined by Archives New Zealand.

#### **3.5.2 Missing records from W4262**

During the appraisal a number of records that were appraised as part of W4262 (and noted as missing at time of transfer) were located. E-mail advice from Alison Midwinter of Archives New Zealand Government Record keeping Group clarified that any files listed in this appraisal, which are also detailed in the MoE's database of files transferred and known as accession W4262 should be re-appraised. This decision is based on

- The original disposal authority is no longer valid.
- The appraisal decisions to transfer the material may have changed, due to the exceptional circumstances of the original appraisal.
- And the final list for the original accession (W4262) is being consolidated and all "missing" material has been removed from Archives New Zealand's list of W4262.

It was felt that the effort required to cross check and match items found in this appraisal with W4262 and then integrate it into the original collection would be greater than is warranted.

#### **3.5.3 Empty files**

The list contains entries for files that have no contents. The recommendation for these files is destruction.

#### **3.5.4 Publications**

The Ministry's corporate librarian, Leslie Nash checked published items from the lists against the MoE's catalogue to establish if the Ministry or National Library had copies of these publications.

#### **3.5.5 Linear metres**

E-mail advice from Archives New Zealand Government Record keeping Group clarified that an assessment of overall linear metreage in this appraisal report would suffice. However an approximation of linear metres for each series has been attempted.

#### **3.5.6 Maori Education Foundation Records**

The Ministry intends to consult the MET: Maori Education Trust (the successor organisation to the MEF: Maori Education Foundation) regarding the ownership of the MEF records and the recommendations which relate to the MEF records as outlined in this report. The Ministry has

possession of the MEF records as a consequence of being Secretariat to the Foundation. The MEF also deposited approx 3 boxes of MEF records with the Ministry when the MEF wound up. The legal position is that the MET inherited the assets of the MEF. Therefore the records of the MEF belong to the MET. However the MET does not own the Ngarimu records as these records belong to the Ministry. The Ngarimu scholarships are still offered and the MET is contracted by the Ministry through the TEC: Tertiary Education Commission to administer this scholarship. As the records of the MEF and the Pacific Island Polynesian Education Foundation were managed by the same Secretariat the records are physically intertwined, as are the MEF and the Ngarimu records. Therefore the Ministry feels that it is in the best position (after consultation with the MET) to have these records appraised and the recommended disposal carried out. It should also be noted that the accessions W4262 and A739 contain Maori Education Foundation records including scholarship files. These accessions were transferred to Archives New Zealand by the Ministry of Education on behalf of its predecessor body the Department of Education.

### **3.6 References used**

- Directory of Official Information 1987, 1989, 2001  
The Department of Education 1877-1989 A Guide to Its Development *by Susan Butterworth, 1993*  
End of an Era New Zealand Education Boards *Edited by John Nimmo, 1989*  
Report of the Commission on Education in New Zealand, *Chairman Sir George Currie, 1962*  
Administering for Excellence, Taskforce to Review Education Administration. Education in New Zealand, *J C Dakin*  
Department of Education Administration Manual Part A - Administration General.
- Annual Report of the Department of Education for the year ended 31 December 1960, 31 December 1969, 31 December 1968 and 31 March 1982, 31 March 1986, 31 March 1987, 31 March 1988.
  - New Zealand Official Yearbook 1962, 1970, 1988-89, Department of Statistics
  - Curriculum 80s Number Three Proposal for a Board of Studies, Report of the Working Party on the Board of Studies, Department of Education, Wellington, 1984

### **3.7 Legislation referred to**

- Education Act 1914  
Education Act 1964  
Education Amendment Act (No. 2)  
The Ngarimu VC and 28<sup>th</sup> (Maori) Battalion Memorial Scholarship Fund Board Act 1945  
The Maori Education Foundation Act 1961

### **3.8 Explanatory notes for the lists**

The Flying Filing Squad has listed all records offered in this appraisal. They are being offered to Archives New Zealand in MS Excel format. Unfortunately the quality assurance process did not pick up on the spelling errors throughout the lists. The size of the lists made spell checking impossible for the appraisal phase. During the transfer phase of this project the list will be spell checked.

The lists have been sorted into the following order - series, sub-series and subject. Where accurate agency information is known the records have been separated out into a list for records created by the agency. Where this was not possible the list has been defined by series. Therefore, there are 19 separate lists.

#### **3.8.1 Worksheet title details used in the spreadsheet**

1. Research and Statistical Records (including Census - Equal Educational Opportunities Education Sector, (employees in early childhood, school and tertiary

- sectors), Statistical Return for Students Enrolled at Polytechnics, Out of School Care Survey Forms, Pathways to Employment Project, IEA: International Association for the Evaluation of Educational Achievement; Mathematics New Zealand Second International Mathematics Study and Reading Literacy Study
2. Financial records (including Hardship Grants)
  3. MEF: Maori Education Foundation and Pacific Islands Polynesian Education Foundation – Scholarships
  4. International Education and Islands Education
  5. VTC: Vocational Training Council and ITEA: Information Technology Education Authority
  6. Legal
  7. School Property
  8. Ministerial
  9. Board of Studies
  10. Publications
  11. Closed Schools
  12. Early Childhood Education
  13. Special Education
  14. School - furniture, equipment, breaking and entry, caretaking and vandalism
  15. Administration (including accommodation, equipment, information technology and information management)
  16. Access Training
  17. Curriculum
  18. Personal Files Teachers, Departmental Staff
  19. Staffing and Employee Records, Tertiary Primary, Secondary, Teachers, Examinations and Assorted Departmental records.

### **3.8.2 Use of red text in list**

The red text indicates information that has been added after the completion of the listing process by the Filing Flying Squad. Series and sub-series information was added in order to sort the list into manageable series for the appraisal process. Square brackets were not used as this technique affects the sorting process adversely. In the transfer phase of this project the red text will be square bracketed as per Archives New Zealand listing standards.

### **3.8.3 Use of yellow highlight in list**

The use of yellow highlight on a row indicates that the item has been examined as part of the analysis process.

### **3.8.4 Use of orange column in the worksheets**

During the internal MOE consultation process for this appraisal the Legal Services team were asked to give their opinion on the retention or destruction of certain files. While generally agreeing with the disposal recommendation for destruction, the legal team requested that MOE retain certain records for a further 5 years in case of any appeals pending. To record that requirement in the lists a further column has been added to the relevant worksheets and highlighted in orange with the notes “A Keep a further 5 years in offsite storage” to ensure that this is actioned during implementation of the appraisal decisions. This MOE action does not supersede the disposal recommendation for approval, but is rather for MOE internal processing following approval.

## **4. Records Description and Evaluation**

Outlined below is a description and evaluation of each series offered for appraisal.

Many of the records offered for appraisal did not form part of any formal file classification structure. For ease of appraisal and assessment therefore the records were grouped by series as many of the record types were generated across agencies.

The table below outlines each series of records more in the manner of a 'class' showing a summary of what groups of records were created by which agencies.

<b>Creating Agency</b>	<b>Series/group of records</b>
Residual Management Units	Personal Files Departmental file series
Education Boards	Property: Equipment Register Schools Personal Files Financial Board file series
Ministry of Education	Census  IEA: The International Association for the Evaluation of Educational Achievement, Reading and Literacy Study  Ministerials
Department of Education	Departmental file series including International Education, Islands Education (includes student personal files), Northern Regional Office Auckland Files, ECE: Early Childhood Education, Special Education Personal Files School Property Schools: furniture, equipment, caretaking Ministerials Closed Schools Financial records (including hardship grants) IEA: The International Association for the Evaluation of Educational Achievement, 2 <sup>nd</sup> Maths Study Publications; Banderproofs, School Journals
Maori Education Foundation	Ngarimu VC and 28 <sup>th</sup> (Maori) Battalion Memorial Scholarship Fund Board, Scholarships, Administrative Files
Pacific Islands Polynesian Education Foundation	Scholarships and Administrative Files
Board of Studies	Boards file series
Vocational Training Council	Council file series
ITEA: Information Technology Education Authority	Authority file series.

#### **4.1 Research and Statistical records**

Description:	This series contains records relating to research and statistical information. The series includes records on census material, international research on mathematics, reading and literacy, employment and enrolment statistics.
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**EEO: Equal Educational Opportunities, Census, Early Childhood, School and Tertiary Sector Employees**

As part of the Ministry of Education's responsibility to monitor equal employment opportunities in the education sector the Ministry conducted a census of all employees in the early childhood, school and tertiary sectors in September 1990. The information supplied was to be combined with data already held on the individuals' personal education payroll record. The Ministry assured the individual that the information supplied would be strictly confidential.

**IEA:** The International Association for the Evaluation of Educational Achievement is an international, non-profit-making scientific association incorporated in Belgium for the principal purposes of:

- Undertaking educational research on an international scale.
- Promoting research aimed at examining educational problems in order to provide facts which can help in the ultimate improvement of educational systems; and
- Providing the means whereby research centers in the various member countries of IEA can undertake cooperative projects.

**IEA: International Association for the Evaluation of Educational Achievement Reading and Literacy Study**

The booklets contain student questionnaire and reading tests Session 1 and 2. The responses are labeled with the school name/id and the students name and id. This includes personal information identifying the child by name. Booklets have been scored/assessed. The booklets are the same as some that went out to different geographical locations within NZ denoted by the population A (primary 10yrs old) or B (secondary 14yrs old).

**IEA: International Association for the Evaluation of Educational Achievement Mathematics New Zealand School International Second Mathematics Study**

The IEA study of secondary school mathematics covered 23 countries including New Zealand. A small unit in the New Zealand Department of Education had the responsibility for the international coordination of the project. Two populations were investigated as part of the study: Population A, corresponding to New Zealand third formers and Population B, corresponding to New Zealand seventh form Pure Mathematics students. Prior to the publication of the definitive report on New Zealand outcomes of the study a series of interim analysis reports provided information, as it became available.

**Pathways to Employment Project**

The Pathways to Employment study was a collaborative study



	<p>between the Dunedin Multi-disciplinary Health and Development Research Unit and the Department of Education. The project studied Form 4 students in Otago. The purpose of the research was to learn about the decisions taken and the pathways followed by people in the transition from school to work. The report "<i>Teenage aspirations in Otago: report from the first year of the Pathways to Employment Project</i>" (Silva, P., 1989) is the only publication from this study.</p> <p><b><u>Students Enrolled at Polytechnics</u></b> Statistical returns for Students enrolled at Polytechnics in formal programmes.</p>
Date range:	1976 – 1991
Quantity of records:	<b>Approx. 10.3</b> linear metres
Evaluation:	<p>The majority of the records are concerned with raw statistical data. They are operational routine records of short-term administrative use to the Ministry and its predecessor bodies.</p> <p>The records from the 2<sup>nd</sup> Maths study which have been recommended for retention comprise the only evidence of this study as no Departmental files were created for this work. The final version of the report for this study was created in New Zealand.</p>
Recommendation	<p><b>Archive:</b> those records that provide information that has research potential in the areas of social policy, education policy, operation and development of the education system, education environment in New Zealand in general.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are published material;</p> <p><b>Destroy:</b> those records that contain information summarised, more complete and/or more readily accessible in other records recommended for retention or elsewhere.</p> <p><b>Destroy:</b> those records that are empty files.</p>
Linear metres recommended for retention:	<b>Approx. 2.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 8</b> linear metres

#### 4.2 Financial Records

Description:	<p>This series contains records created by the Ministry of Education and its predecessor agencies.</p> <p>The majority of financial records were covered in the first appraisal report approved for destruction in October 2003. However, where a box had mixed contents (i.e. some financial records and some non-financial records) the decision was made to include those boxes in this second appraisal report.</p>
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	<p>The majority of financial records encompass low level routine financial records only. Therefore, they are being recommended for destruction.</p> <p>Most of the records offered in this appraisal are unregistered papers and files, which is fairly typical of many agencies' financial operations. On the list therefore, many of the records have been assigned 'sub-series' covering like processes and functions that can then be expressed as a disposal class.</p> <p>Records comprise routine financial records, including the following:</p> <ul style="list-style-type: none"> <li>• Administration and Accounts</li> <li>• Accounts Payable and Receivable (includes hardship grants, boarding bursaries)</li> <li>• Asset Management</li> <li>• Audit</li> <li>• Bank Records</li> <li>• Correspondence</li> <li>• Financial Statements and Annual Accounts</li> <li>• Ledgers and Reports</li> <li>• Payroll</li> <li>• Tax Records</li> </ul> <p>The financial records that were considered worthy of retention were key documents relating to a payroll project, salary cards for relieving teachers, new policy proposals for estimates and expenditure and annual estimates.</p>
Date range:	1920 – 1991
Quantity of records:	<b>Approx. 201.6</b> linear metres
Evaluation:	<p>The majority of records offered for appraisal are lower level financial records comprising of day to day financial transactions for the Otago Education Board, Department of Education, Department of Education RMU, Education Boards RMU. The majority of records have no long-term value and are very transaction based.</p> <p>The dates of the financial records which are recommended for destruction are outside of any retention period specified in any piece of financial legislation. Summary financial information for the agencies concerned may be found in their respective annual reports for each year.</p> <p>The disposal recommendations made are consistent with those appraised and approved in October 2003.</p> <p>.</p>
Recommendation	<p><b>Archive:</b> those records that document the financial accountability of the Ministry of Education, or the creating agency - its financial standing, obligations, and its conduct of financial affairs</p> <p><b>Destroy:</b> those records that concern routine</p>

	administrative matters only
Linear metres recommended for retention:	<b>Approx. 6</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 195.6</b> linear metres

#### 4.3 Maori Education Foundation, Ngarimu VC and 28<sup>th</sup> (Maori) Battalion Memorial Scholarship Fund Board and the Pacific Islands Polynesian Education Foundation records

Description:	<p>This series covers records created through the administration of the Maori Education Foundation, Ngarimu VC and 28<sup>th</sup> Maori Battalion Memorial Scholarship Fund Board and the Pacific Islands Education Foundation. The records of these three authorities have been brought together in one series as over time details of which records were created by which secretariat has been lost.</p> <p>For example, when the listing of these records was completed it became apparent that records of the Pacific Islands Polynesian Education Foundation and the Maori Education Foundation had been administered by the same Secretariat within the Department/Ministry. Also, that the records had been boxed and stored together. Therefore, it was impossible to accurately separate out the series as they detailed the same type of functions, namely, the awarding of scholarships.</p> <p>This series includes some files regarding the founding of the Maori Education Board that were inherited from the Department of Maori Affairs.</p> <p>The series is arranged in a formal file classification structure.</p> <p>The records encompass the operating records of the Foundation and are believed to be the only records of this agency. The series also includes the day-to-day accounts of income and expenditure.</p> <p>The large bulk of the records offered for appraisal consist of individual grant application files containing sensitive personal information used to support the application for funding for education. These applications cover the Maori Education Foundation, The Ngarimu VC and 28<sup>th</sup> (Maori) Battalion Memorial Scholarship Fund Board and the Pacific Islands Polynesian Education Foundation.</p>
Date range:	1927 – 1994
Quantity of records:	<b>Approx. 50.3</b> linear metres
Evaluation:	<p>The majority of the records are concerned with the routine administration of the scholarship process and provide detail of applications and the awarding of scholarships to individuals. They are operational routine records of short term administrative use to the Foundation that contain information of a highly personal and sensitive nature. Therefore these records are being recommended for destruction.</p>

There are also small groups of records relating to specific prizes, Trusts or evaluation committees that contain records of the history and policies in place at the time surrounding the awarding of funding to individuals or institutions.

Other records included in this series relate to routine corporate functions such as finance and are low level administrative records.

Description of scholarship records -

**PIPEF: Pacific Islands Polynesian Education**

**Foundation – scholarship records**

Assistance at Secondary School: The Pacifica Education Trust is administered jointly by the Trust and the Pacific Islands Polynesian Education Foundation. The assistance is of a supplementary nature and students of Cook Islands, Niuean, Tokelauan, Tongan or Samoan descent who hold NZ citizenship or have been granted permanent residence in NZ are eligible. Typically these files contain individual application forms name, address, latest school report attached, name of school that will be attended, Parent/ Guardian details including number of people in the home, income, employment details. Principals assessment of student.

Application for financial assistance for Tertiary Study: The PIPEF provides supplementary financial assistance to Pacific Islands Polynesian students attending a university, teachers college, polytechnic, or similar tertiary institutions. Application form, including budget, university student record, enrolment fees paid, letter advising outcome.

Norman Kirk Awards: this award is for one year and recipients are selected from PIPEF Tertiary Study Applications.

**Maori Education Foundation – scholarship records**

General Tertiary Grant: available to Maori students who wish to undertake tertiary studies at a recognised tertiary institution. Forms contain the following information: name, DOB, address, list of qualifications, name of tertiary institution the applicant will be attending, name of qualification the applicant is studying towards, list of papers to be taken, duration of study, whakapapa, budget, bank details, detached receipt notification, the forms have declined or paid on them.

Ngarimu VC and 28<sup>th</sup> Maori Scholarship: individual files for award of university scholarship. A typical files contains: confidential report for the principal to complete, covering intelligence, academic ability and special skills; personal characteristics i.e. honesty, integrity etc; copies of school reports and qualifications; copy of birth certificate; character references. Application form includes photo, name, address, parents' details, qualifications, involvement in Maori community services, commitment to promoting and maintaining Maori language and culture, subject to be taken, leisure interests, whakapapa. There

	<p>is also a questionnaire from Dept re plans of scholarship holder in relation to the next year, a letter from Dept saying the Board has decided to renew scholarship for the next year, correspondence from scholarship holder describing how they are doing in regard to their study, receipts for re-imburement.</p> <p><u>Maori and Polynesian secondary school scholarship- distance scholarship:</u> Are awarded to Maori and Polynesian pupils who must live away from home to attend secondary school. Format is individual forms which occasionally have a photo attached.</p> <p><u>Maori and Polynesian secondary school scholarship- higher education:</u> Individual application forms which have no indication if they were successful or not. Forms contain the following information – name, address, parents’ details, copy of birth certificate, examination results, reference from principal, support statement from hapu or extended family, photo, whakapapa.</p>
Recommendation	<p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency</p> <p><b>Destroy:</b> those records that concern routine administrative matters only</p> <p><b>Destroy:</b> those records that are empty files</p>
Linear metres recommended for retention:	<b>Approx. 4.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 46.0</b> linear metres

#### 4.4 International Education and Islands Education, Department of Education file series

Description:	<p>The Archives New Zealand GAIMS documentation has an entry relating to an appraisal job 83/251 for International Education. The GAIMS documentation indicated that this job had resulted in a transfer. However Archives staff advised me that the transfer never took place and the documentation shows that a decision was made for the Department to store the files at the Lower Hutt Records Centre for a further period of time. The papers on the appraisal file list a total of 101 boxes.</p> <p>It has been established that the list for appraisal job 83/251 relates to some of the files that have been listed as part of this appraisal process. They are in boxes that are waxed Archives NZ boxes and appear to be ready for transfer. Rather than the 101 boxes on the appraisal job file, a comparison of the appraisal job list against the new listing shows a match for boxes 15-101 (a total of 86 boxes, these boxes hold approx 1500 student personal files for International Education and cover Tonga, British Solomons, Gilbert and Ellis, Naru, Cook Islands, Niue Island, Papua New Guinea, Tokelau.</p> <p>The individual scholarship files typically contain an envelope which holds a birth certificate, passport and vaccination details. For the file sighted these documents had been returned when the</p>
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	<p>recipient returned to the Islands. The remaining items contained in these envelopes were a photo of the scholarship recipient; order forms for clothing provided by External Affairs' Aid Division and letter from the Department of Labour, Immigration Division advising extension to temporary permit for the recipient; yearly report by the scholarship officer on the recipients' progress including recommendation; telegram and travel detail regarding return to the Islands and a summary card with photo on reverse and details of DOB, name, scholarship number, and location year to year. Some of the larger files have correspondence between the recipient and the scholarship officer and in some instances quite a relationship builds up which gives an interesting insight into the recipient's life in NZ.</p> <p>This series of records also covers exchange programmes in China.</p> <p>This series includes files from the Islands Education Branch of the Department of Education. The Islands Education Division of the Department carried out advisory work in the Pacific Islands and had responsibility for about 200 teachers scattered in the areas from Tarawa to Pitcairn Island. The Division also supervised approx. 400 Pacific Islands students in universities and schools in New Zealand or in training for trades and professions. The sub-series include publications, scholarships for apprenticeship positions i.e. Motor Mechanic with NZ Railways, Refrigeration Trades Apprentice for the Department of Labour, Teachers Training.</p>
Date range:	1908 – 1991
Quantity of records:	<b>Approx. 41.6</b> linear metres
Evaluation:	<p>The Pacific Islands student personal files are being recommended for retention as these files provide a unique insight through the correspondence between the student and the scholarships officer into the impressions and thoughts of the NZ lifestyle. This historical interest outweighs the administrative, routine nature of these files.</p> <p>A small number of personal files of the Department, International Education Division are also recommended for retention. Once again these files are seen as unique and worthy of retention as they complete the picture of Pacific Island education and will complement the retention of the student personal files as a social research resource. Because of the personal nature of both of these sets of files we are recommending a 70-year restriction on access.</p> <p>The material recommended for destruction consists of files relating to the teacher exchange programme, staffing and finance and account information.</p>
Recommendation	<p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency</p> <p><b>Destroy:</b> those records that concern routine administrative matters only</p>

	<b>Destroy:</b> those records that are empty files
Linear metres recommended for retention:	<b>Approx. 34.0</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 7.6</b> linear metres

#### 4.5 Vocational Training Council and ITEA: Information Technology Education Authority

Description:	<p><b><u>Vocational Training Council</u></b></p> <p>The series contains records created and managed by the Vocational Training Council. The VTC was established in 1969 and the primary responsibility for the VTC moved from the Minister of Education (Department of Education) to the Minister of Labour (Department of Labour) in 1982. The records encompass the operating records of the Council. Existing agency documentation from Archives New Zealand indicates that four appraisal job files and three accessions have been actioned on behalf of the VTC.</p> <p>The records are arranged in a formal file classification structure and are multiple number subject files. An indication of contents follows:</p> <p>27 - Training Development Assistance  620 – Administration  3000 – Industry - New Technologies, Micro Electronics  3010 – Industry - New Technologies, Micro Electronics, <i>Electronics Technology</i>  3020 – Industry - New Technologies, Micro Electronics, <i>Data Processing</i>  3030 – Industry - New Technologies Micro Electronics <i>Information Technology</i></p> <p><b><u>ITEA: Information Technology Education Authority</u></b></p> <p>The ITEA series contains records created and managed by the Information Technology Education Authority. They are arranged in a formal file classification structure of multiple number subject files. This was the main correspondence series for the Information Technology Education Authority. There is a copy of the file classification structure.</p> <p>The records encompass the operating records of the Authority and are believed to be the only surviving records of this agency.</p> <p>Series structure is as follows</p> <p>1 – Administration  2 – Personnel  3 – ITEA  4 – Management Committee  5 – Working Party  6 – Committee of Training Providers  7 – National Advisory Committee  8 – Associated Bodies  9 – Projects  10 – Information</p>
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	11 – Working Party on E E Qualifications 12 – Communications Qual. Joint Committee
Date range:	1983 – 1991
Quantity of records:	<b>Approx. 4.9</b> linear metres
Evaluation:	The majority of the records reflect the functions and activities of these two agencies and therefore provide evidence of the decision making process of these agencies.  There is a small number of administrative records. These records comprise financial, personal and administration records and are of no long-term value.
Recommendation	<b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency <b>Archive:</b> those records that document the performance of a substantive function of the creating agency.  <b>Destroy:</b> those records that concern routine administrative matters only. <b>Destroy:</b> those records that are empty files.
Linear metres recommended for retention:	<b>Approx. 4.6</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 0.3</b> linear metres

#### 4.6 Legal Records

Description:	This series contains records created by the Department of Education and which relate to Legal matters. The series includes records relating to appeals, employees disciplinary cases, bonds, legislation, litigation, opinions, petitions, contracts, contracts, deeds, and school integration charters/agreements.
Date range:	1916 - 1990
Quantity of records:	<b>Approx. 17.9</b> linear metres
Evaluation:	Legal records which relate to the creation of new legislation and significant changes to existing legislation, which were seen to be of historical significance have been recommended for retention. Examples of this legislation include papers that relate to Tomorrows Schools (Before Five, Early Childhood Education), enrolment schemes, foreign students, integration of private schools, The Tertiary Education and Vocational Training Bill which became the Learning for Life amendment.  Teacher appeals and disciplinary action files are recommended for destruction to ensure disposal is in line with the Human Resources General Disposal Authority (GDA). The Human Resources GDA Section 11.4 concerns staff grievances, disputes and dismissals and includes reference to disciplinary matters. This class recommends destruction after 7 years after the date of last action with the primary justification being that major



	<p>precedent cases will be on public records in proceedings of other bodies. As the teacher appeal and disciplinary files relate to individual cases, it is considered that this class within the GDA is comparable in terms of the subject matter and content of the Teacher Appeal and Disciplinary File series.</p> <p>Student bond cases, bus contracts, non substantial legal opinions, submissions and judgments that would be held by the General Assembly Library are recommended for destruction.</p>
Recommendation	<p><b>Archive:</b> those records that provide proof of a particular event or agreement, document the rights/legal interests/obligations of the Government, the Ministry of Education or its predecessor agencies and/or the citizens of New Zealand.</p> <p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Archive:</b> those records that provide evidence of the development of public policy in the area of the Ministry of Education's substantive functions.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are empty files.</p> <p><b>Destroy:</b> those records consistent with the recommendations contained in the Human Resources General Disposal Authority.</p> <p><b>Note:</b> some files that have been recommended for destruction will be retained by the Ministry for a further five years prior to the destruction as they still fall within appeal periods and further work may arise in relation to particular cases. This has been identified on the lists with an extra column in orange with an MOE disposal action.</p>
Linear metres recommended for retention:	<b>Approx. 3.6</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 14.3</b> linear metres

#### 4.7 School Property Records

Description:	<p>This series contains school plans, new works projects, buildings and sites, design briefs.</p> <p>The aperture cards of school plans cover the period 1941 – 1989 and represent schools over the whole of New Zealand. On each card is an image of a plan of buildings from the particular school.</p> <p>The New Works Project files for 1992/1993 cover improvements to Wellington Schools. The files were created by the Ministry of</p>
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	<p>Education, District Property Manager, Lower Hutt. The content includes new buildings, additions and alterations (encompassing improvements to heating, roof replacements, access for disabled, toilets, electrical and lighting). The files cover the period 1990 – 1995.</p> <p>The building and sites records cover schools by districts, primary, secondary, tertiary and school camps. There are also maintenance files for various school properties. Architectural design brief for various</p>
Date range:	1909 – [1995]
Quantity of records:	<b>Approx. 30.0</b> linear metres
Evaluation:	<p>The new works project files include documentation on the tender process. They include details on the successful tender and final completion certificates. This certificate effectively completed the project. The records reflect the routine administration of this aspect of property management. Therefore they are being recommended for disposal.</p> <p>The aperture cards are in good condition. Today plans for schools are the responsibly of the school itself. Any original plans, which are held by the Ministry, are first offered back to the school. The plans are seen as a unique set and therefore are recommended for retention.</p> <p>The building and site files of significance are recommended for retention, as they may be required for legal purposes.</p>
Recommendation	<p><b>Archive:</b> those records that provide proof of a particular event or agreement, document the rights/legal interests/obligations of the Government, the Ministry of Education or its predecessor agencies, the citizens of New Zealand</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are empty files.</p>
Linear metres recommended for retention:	<b>Approx. 16.0</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 14.0</b> linear metres

#### 4.8 Ministerial Records

Description:	<p>The majority of Ministerials were created by the Ministry of Education with a lesser number being created by the Department of Education. The documents in this series consist of written material between the Ministry and/or Department of Education and the Minister of Education. The documents created by the Ministry of Education were placed offsite by the Ministerial Unit who were responsible for channeling, coordinating and tracking all ministerial correspondence between the Ministry and the Minister.</p>
Date range:	1974 – 1992

Quantity of records:	<b>Approx. 33.6</b> linear metres
Evaluation:	<p>Records consist of draft and direct replies, referred correspondence, parliamentary questions and submissions. The submission types include briefing note and speech note requests, draft speeches, parliamentary petition submissions to cabinet committees, submissions for the ministers' attention, cabinet papers, Official Information Act requests, Ombudsman's correspondence, Privacy Act requests and Select Committee requests.</p> <p>The Ministerial unit of the Ministry of Education provides a back up service for some types of Ministerials. Therefore although it could be assumed that the key documents have been filed on Ministry and Department subject files it cannot be guaranteed.</p> <p>Key Ministerial types which have been recommended for retention are as follows: Briefing Notes, Submissions (including a register of submissions for 1980-1986), Parliamentary Petitions, Parliamentary questions, Official Information requests, Ombudsman's requests.</p> <p>Recommended for destruction are the following ministerial types: Cabinet papers, Ministerial correspondence, referred correspondence, direct replies, draft replies.</p>
Recommendation	<p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Archive:</b> those documents that provide evidence of the development of public policy in the area of the Ministry of Education's substantive functions.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that contain information summarised, more complete and/or more readily accessible in other records recommended for retention or elsewhere.</p> <p><b>Destroy:</b> those records that are drafts and/or duplicates of other records.</p> <p><b>Destroy:</b> those records that are published material.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres recommended for retention:	<b>Approx. 14</b> linear metres
Linear metres recommended for destruction:	<b>Approx. 19.6</b> linear metres

#### 4.9 Board of Studies

Description:	<p>This series contains records created by the Ministry of Education and its predecessor agencies. The records in this series provide evidence of the substantive functions of the Board.</p> <p>The board records are unregistered papers and files.</p>
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	<p>Records include:</p> <ul style="list-style-type: none"> <li>• Committee - Agenda and Minutes</li> <li>• Correspondence Registers</li> </ul>
Date range:	1986 – 1990
Quantity of records:	<b>Approx.: 2.0</b> linear metres
Evaluation:	The records offered for appraisal provide evidence of the key functions of the Board. The records of the Board are unique and provide an insight into the secondary curriculum, syllabus and the award system in secondary schools. The Board of Studies was advocated as a means by which professionals whose interest lay in syllabus revisions could be given a formal place in policy discussions.
Recommendation	<p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Archive:</b> those records that provide evidence of the development of public policy in the area of the Ministry of Education’s substantive functions</p>
Linear metres recommended for retention:	<b>Approx.: 2.0</b> linear metres
Linear metres recommended for destruction:	<b>0</b> linear metres

#### 4.10 Publications

Description:	<p><b><u>Bandersheet proofs</u></b></p> <p>This series covers publications produced by the Department of Education and includes a collection of bandersheet proofs, and original manuscripts – some of which were never published.</p> <p>A check against the National Library’s holdings for these publications indicates that only one copy of each of these publications is held.</p> <p>This series contains</p> <ol style="list-style-type: none"> <li>Publications by Ian McCormack on Maori language textbooks, which were used as units of work by teachers for sixth form classes.</li> <li>A set of publications entitled Te Rangatahi which are a series of Maori language courses by Hoani R Waititi.</li> <li>Photos of the 100<sup>th</sup> Anniversary of the Ringata Manutuke, Gisborne, which are part of a series, called Te Whare Kura.</li> <li>Copies of publications from the Schools Publications Branch of the Department of Education, Wellington.</li> </ol>
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	<p>e. A set of trial readers including a Margaret Mahy story entitled Horrakapotchkin, which does not appear to have been published.</p> <p>f. Items from the Te Tautoko series of publications.</p> <p>Information from the National Library and Alexander Turnbull Library indicates that the books were part of a series of ready to read trial readers and written for elementary readers.</p> <p>Within this series are a number of photos and artwork relating to the Te Tautoko and Te Whare Kura series of school publications.</p> <p><b><u>Corporate publications</u></b> There is also a group of Corporate publications from the Department and the Ministry of Education, copies of which are held in the Ministry's Library.</p>
Date range:	1950 – 1993
Quantity of records:	<b>Approx: 29.9</b> linear metres
Evaluation:	<p>This group of records provides examples of the school publication service that was a key initiative of the NZ education system. They are unique and of historical interest.</p> <p>The bandsheet proofs are in need of conservation intervention as sellotape has been used widely and has deteriorated over time. The order of these papers is at risk as with handling as the sellotape comes apart leaving lots of loose 'bits' of documents thereby destroying context. However the uniqueness of these records means that we have recommended that these papers be retained regardless of their condition.</p> <p>The photos and artwork are believed to complement existing school publication artwork holdings of Archives New Zealand and are therefore recommended for retention.</p> <p>The corporate publications such as administration manuals and Research and Statistics Division Bulletins have been checked against the Ministry's current library holdings, and either retained or disposed on depending on items held within the Corporate collection.</p>
Recommendation	<p><b>Archive:</b> those records that provide information that has research potential in the areas of genealogy, social policy, education policy, operation and development of the education system, education environment in New Zealand in general.</p> <p><b>Archive:</b> those records that complete or complement and/or enhance records already held at National Archives</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that contain information summarized, more complete and/or more readily accessible in other records recommended for retention or elsewhere.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres	

recommended for retention:	<b>Approx: 8.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 21.6</b> linear metres

#### 4.11 Closed School records

Description:	<p><b><u>Saint Josephs School Whangarei 1980 – 1994</u></b>  <b><u>Lauder Railway 1985 – 1989</u></b></p> <p>This series contains records created by Saint Josephs School, Whangarei and Lauder Railway. The records are from closed schools. The Ministry of Education and its predecessor bodies would have acquired these records on closure of the schools. Most of the records in this series are unregistered papers and files, which is fairly typical of school recordkeeping systems.</p> <p>This series also contains low level routine financial records, published material and equipment registers.</p> <p>The series also contains some records outlining key high level functions of the school which demonstrate how it was run. This includes items such as: audited statements of accounts, school policies, minute books, agenda, reports and correspondence of the school committees and the Board of Trustees.</p>
Date range:	1980 – 1994
Quantity of records:	<b>Approx: 5.6</b> linear metres
Evaluation:	<p>The majority of records consist of low-level financial records comprising of day to day financial transactions of Saint Josephs School, Whangarei. The majority of records have no long-term value and are very transaction based.</p> <p>School policies, minute books and reports, which document the key decision-making process of the schools, are being recommended for retention.</p>
Recommendation	<p><b>Archive:</b> those records that provide information that has research potential in the areas of genealogy, social policy, education policy, operation and development of the education system, education environment in New Zealand in general.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are published material.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres recommended for retention:	<b>Approx: 2.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 3.3</b> linear metres

#### 4.12 Early Childhood Education

Description:	<p>The early childhood education services previously administered by the Department of Social Welfare were transferred to the Department of Education on the 1 July 1986. The department's resources were increased and reorganised in relation to its larger, more diverse responsibilities. The Department of Education early childhood education services through:</p> <ul style="list-style-type: none"> <li>• Licensing of providers</li> <li>• Professional support and guidance</li> <li>• Financial assistance in the form of subsidies, grants, or total full cost.</li> </ul> <p>This series contain Early Childhood Education records. The Department of Education, Northern Regional Office (Auckland), created the majority of these records. The records cover individual files for Playcentres, Kindergartens, Childcare Centres and Kindergarten Associations in the Auckland area from the 1970s-1980s.</p> <p>These files contain</p> <ul style="list-style-type: none"> <li>• Returns of sessions held.</li> <li>• Purchase of resources.</li> <li>• Additions and alterations to premises.</li> <li>• License and certificate of registration for the early childhood provider (copies of teachers qualifications/marriage certificates).</li> <li>• Liaison correspondence with the local Council, the Department of Health and the Department of Social Welfare.</li> </ul> <p>This series also contains individual files for community based non-profit making groups, childcare and private kindergartens licensed with Social Welfare.</p> <p>These files contain</p> <ul style="list-style-type: none"> <li>• Applications for recognition for financial assistance</li> <li>• Budgets</li> <li>• Returns of sessions held.</li> </ul> <p>This series also has file created by the Wanganui Education Board in relation to staffing and rolls for early childhood centres.</p> <p>These files contain</p> <ul style="list-style-type: none"> <li>• Higher duty allowances.</li> <li>• Travel expenses.</li> <li>• Reliever returns.</li> </ul>
Date range:	1960 – 1991
Quantity of records:	<b>Approx: 33.6</b> linear metres
Evaluation:	<p>The majority of early childhood records consist of routine administrative matters for individual early childhood providers and therefore are of short-term value. The Ministry of Education, District Offices are still adding to this series of files. Given the routine nature of these files they are being recommended for destruction.</p> <p>The Kindergarten Association files provide an overall picture of</p>

	<p>the individual centres they encompass. Their content includes minutes of meetings and newsletters. The administrative correspondence on these files tends to cover issues from more of a holistic view when compared with the individual Kindergarten files whose content is consistently repetitive in nature.</p> <p>The CPSW: Community Pre School Workers files (Auckland) contain reports written by the workers on early childhood centres in their respective areas of coverage. These files give an insight into early childhood conditions and practices in Auckland area and the issues these workers confronted on a day to day basis.</p>
Recommendation	<p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Archive:</b> those records that provide evidence of the Ministry of Education's interaction with outside groups and their influence on the development of policy and/or procedures.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are published material.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres recommended for retention:	<b>Approx: 14.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 19.3</b> linear metres

#### 4.13 Special Education

Description:	<p>This series covers special education, which encompasses intellectually handicapped, hearing impaired, partially sighted and special classes for backward children. It also includes kindergartens, residential special schools and psychological services.</p> <p>The series was created by the Department of Education. The series is arranged in both formal file classification structure and unstructured information.</p>
Date range:	1953 – 1990
Quantity of records:	<b>Approx: 3.9</b> linear metres
Evaluation:	<p>The records recommended for retention include policy files, minutes, management and advisory committee files for special residential schools, prison education, programme information for backward pupils, hospital classes, health camps and psychological services files.</p> <p>These records reflect the functions and activities of special education and therefore provide evidence of the decision making process.</p>



	<p>There are a small amount of administrative records. These records comprise of payroll records and draft reports therefore are of no long-term value.</p> <p>There are also files which contain sensitive personal information relating to students who were assessed in relation to attendance at special classes, or who were “maladjusted” or “backward” pupils. The files name individuals and they often have physiological assessments including results of IQ tests. These files are being recommended for destruction.</p>
Recommendation	<p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> those records that are published material.</p> <p><b>Destroy:</b> all empty files</p>
Linear metres recommended for retention:	<b>Approx: 2.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 1.6</b> linear metres

#### 4.14 School furniture, equipment, breaking and entry, caretaking and vandalism

Description:	<p>This series contains records of equipment registers. The school equipment registers cover the period 1971 – 1991 and were created by the Wellington Education Board. The registers detail the assets of the school and could include land, building, plant, office and school equipment, furniture, and tools etc. Forms detail price and condition of the assets.</p> <p>The registers are in the format of printed envelopes, which are in excellent condition, and the description on the envelope defines the contents as Primary School Equipment Scheme 1985. However the content date range 1971 – 1991 suggests previous and subsequent asset information was also filed in these envelopes.</p> <p>Equipment files typically relate to requisition and write-offs of furnishing and furniture (e.g. carpet, lawn mower etc). The equipment files include annual accounts for statements of expenditure of Government grants for textbook purchases. A file for each school was created.</p> <p>There are caretaking and incidentals files for individual schools that typically contain employment and payroll details for cleaning staff, refund forms for plumbing, fuel, power and water grant details and Dental Clinic cleaning and accounts.</p> <p>Breaking and entry/vandalism files have also been created for</p>
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	<p>each school. They typically contain the police acknowledgement form, and the repair report on break in.</p> <p>The general files for each individual school typically contain maintenance and heat and light grants, employment and industrial relations issues, leave and travel allowances, special classes payments. The Canterbury Education Board created the files.</p>
Date range:	1945 – 1991
Quantity of records:	<b>Approx: 46.6</b> linear metres
Evaluation:	<p>The school equipment registers are effectively low-level financial records created to help manage school assets. The registers have no long-term value. The dates of the registers are outside of any retention period specified in any piece of financial legislation. The registers are recommended for disposal.</p> <p>The majority of records offered for appraisal in this series are low-level operational records comprising of day to day transactions and as such are recommended for disposal. This includes equipment, caretaking and reports of vandalism to the police and repairs.</p> <p>The vandalism records recommended for retention relate to statistical return information from the Education Boards.</p>
Recommendation	<p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> all empty files</p>
Linear metres recommended for retention:	<b>Approx: 0.6</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 46.0</b> linear metres

#### **4.15 Administration (including accommodation, equipment, information technology and information management).**

Description:	<p>This series covers the routine administrative records of the Education Boards and Education Department. These records include office accommodation, furniture and equipment, vehicles and stores.</p> <p>The series also includes records relating to information management which covers library software, statistics, costs, and objectives and planning of the library. The information technology records relate to backup tapes for a general accounting system, Taranaki Education Board, and the Taranaki</p>
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	Education Board School Committee Accounts.
Date range:	1986 – 1990
Quantity of records:	<b>Approx: 33.3</b> linear metres
Evaluation:	<p>This group of records are low level administrative records. The majority of records have no long-term value and reflect the routine operational records of the Boards and Department.</p> <p>The records that are being recommended for retention relate to file indexes, minutes of meetings, and education property files.</p>
Recommendation	<p><b>Archive:</b> those records that provide proof of a particular event or agreement, document the rights/legal interests/obligations of the Government, the Ministry of Education or its predecessor agencies and/or the citizens of New Zealand.</p> <p><b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or the creating agency.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres recommended for retention:	<b>Approx: 7.0</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 26.3</b> linear metres

#### 4.16 Access Training

Description:	<p>This series relates to continuing education for individuals requiring access to teaching and learning resources available through polytechnics. In 1986 it was estimated that as a result of the Government's policy initiatives more than 4,000 students would enter polytechnics in 1987 through the access programme.</p> <p>This series incorporates returns from the Polytechnics regarding financial information and payments for running the access programme.</p> <ul style="list-style-type: none"> <li>• The inspection reports cover budgeting, account systems, refunds to the Department of Education and the Polytechnics financial position.</li> <li>• The working papers typically include access recoveries summary (course name, tutors' salary, building rental, cleaning, off campus costs, student costs and allied staff)</li> </ul>
Date range:	1986 – 1990
Quantity of records:	<b>Approx: 5.6</b> linear metres
Evaluation:	The records offered for appraisal are low level financial records comprising of the day to day financial transactions associated with running access courses in Polytechnics. The records have

	no long-term value and are very transaction based.  The dates of the records recommended for destruction are outside of any retention period specified in any piece of financial legislation.
Recommendation	<b>Destroy:</b> those records that concern routine administrative matters only
Linear metres recommended for retention:	<b>Approx: 0</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 5.6</b> linear metres

#### 4.17 Curriculum

Description:	This series covers school curricula. The files relate to teaching and learning in primary and secondary schools. The majority of files are arranged in a formal file classification structure.
Date range:	1945 – 1989
Quantity of records:	<b>Approx: 9.3</b> linear metres
Evaluation:	The curriculum files being recommended for retention cover the subjects; Social Studies, English, Music, Arts and Crafts, Health and Visual Education. The files relating to Science, Computer Education, Drama and encapsulated in the sub-series “Subject Development” are also worthy of retention, as are the records relating to various reviews of the curriculum.  The records which are recommended for destruction in this series cover empty files, draft mathematics modules, draft reports and publications.
Recommendation	<b>Archive:</b> those records that document the performance of a substantive function of the creating agency. <b>Archive:</b> those records that provide evidence of the Ministry of Education’s interaction with outside groups and their influence on the development of policy and/or procedures.  <b>Destroy:</b> those records that concern routine administrative matters only. <b>Destroy:</b> all empty files.
Linear metres recommended for retention:	<b>Approx: 7.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 2.0</b> linear metres

#### 4.18 Personal files Teachers and Departmental Staff

Description:	This series relates to employees of Education Boards and the Department of Education including teacher
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	personal files. The majority of teacher personal files in this series belong to teachers who were employed in the South Island.
Date range:	1947 – 1991
Quantity of records:	<b>Approx: 97.6</b> linear metres
Evaluation:	<p>Consistent with the existing approved retention and disposal schedule for Teacher Personal Files, the records in this series are recommended for destruction. The exclusion to this recommendation relates to files of prominent individuals whether that person was an employee of a board, a departmental staff member or alternatively a teacher. Files of general managers, deputy general managers, and their equivalents, of chief architects, and of inspectors of schools are being recommended for retention.</p> <p>Further, it is felt that accession W3460 fulfils the requirements for historical value, official policy and procedures in relation to employees of the Department of Education (which excludes teachers). As does accession W4670 which is a sample of teacher personal files.</p>
Recommendation	<p><b>Archive:</b> those records that provide information about persons of historical interest - persons important in New Zealand's social, educational or political history, or significant in the history of the Ministry of Education or its predecessors.</p> <p><b>Archive:</b> those records that complete, or complement and/or enhance records already held at National Archives.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> all empty files.</p> <p><b>Note:</b> some files that have been recommended for destruction will be retained by the Ministry for a further five years prior to the destruction as they still fall within appeal periods and further work may arise in relation to particular cases. This has been identified on the lists with an extra column in orange with an MOE disposal action.</p>
Linear metres recommended for retention:	<b>Approx: 1.0</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 96.6</b> linear metres

#### 4.19 Staffing and Employee Records, Tertiary, Primary, Secondary, Teachers, Examinations and Assorted Departmental records

Description:	<p>This series is effectively a catch all series for this appraisal. It includes records relating to general staffing issues.</p> <p>This includes:</p> <ul style="list-style-type: none"> <li>• Employment appeals</li> <li>• Bonds</li> <li>• Staffing appointments</li> </ul>
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	<ul style="list-style-type: none"> <li>• Advertisements for vacancies</li> <li>• Information Forms</li> <li>• Establishment Cards and Charts for various positions</li> <li>• Departmental Staff cards</li> <li>• Teacher Salary Cards</li> <li>• Disciplinary Action files</li> <li>• Equal Employment Opportunity Monitoring</li> <li>• Lists of Employees</li> <li>• Superannuation</li> </ul> <p>This series also includes the following records: Academic Bursaries – (financial assistance for pupils who were obliged to live away from home or travel past their local secondary school), Examinations – (School Certificate and Sixth Form Certificate), Principal’s Taskforce, Primary Education – (advisors, curriculum, teachers), Secondary Education – (teachers and exams), Tertiary Education - (teachers, courses and buildings), Area Schools, In-service Training for teachers, Inspectors - (primary and secondary, school inspector reports, and meetings), Integrated Schools, Reform of Education Administration, Learning for Life (Tomorrows Schools), Residual Management.</p>
Date range:	1919 - 1993
Quantity of records:	<b>Approx: 173.6</b> linear metres
Evaluation:	<p>The majority of the staffing records encompass low level routine personnel records. Therefore, they are being recommended for destruction.</p> <p>Teacher salary cards are being recommended for retention as evidence of teachers who worked for the Department. Policy related superannuation records are also being recommended for retention.</p> <p>Records which relate to Learning for Life, Tomorrows Schools and the Reform of Education Administration are recommended for retention.</p> <p>The Inservice records relate to training for teachers and cover financial allocations and course programmes and have been recommended for destruction.</p> <p>As the academic bursaries are essentially grants for financial assistance these records are being recommended for disposal.</p> <p>The residual management, primary, secondary and tertiary education records that reflect policy decisions or reflect substantial functions are recommended for retention.</p> <p>The school inspection report, visits are being recommend for retention These reports are for individual Canterbury schools.</p>
Recommendation	<b>Archive:</b> those records that provide evidence of the structure, organisation, administration and planning of the Ministry of Education, its predecessor agencies or

	<p>the creating agency.</p> <p><b>Archive:</b> those records that document the performance of a substantive function of the creating agency.</p> <p><b>Archive:</b> those records that provide evidence of the development of public policy in the area of the Ministry of Education’s substantive functions.</p> <p><b>Archive:</b> those records that complete or complement and/or enhance records already held at National Archives.</p> <p><b>Destroy:</b> those records that concern routine administrative matters only.</p> <p><b>Destroy:</b> all empty files.</p>
Linear metres recommended for retention:	<b>Approx: 58.3</b> linear metres
Linear metres recommended for destruction:	<b>Approx: 115.3</b> linear metres

## 5 Disposal Actions

This appraisal recommends two disposal actions.

**Archive** - transfer to Archives New Zealand immediately. Under this disposal the records are legally transferred to Archives New Zealand and stored in Archives New Zealand facilities. Records that become archives are no longer the property of the Ministry of Education. They can be borrowed back by the MoE but cannot be reactivated (i.e. have papers added).

**Destroy** - do not transfer to Archives New Zealand, and destroy records through a secure process.

## **6 Quantities for retention and destruction**

Total of 2000 boxes in appraisal, or **666.6** linear meters.

Quantity recommended for transfer: approx. **160.3** linear meters.

Quantity recommend for destruction: approx **506.3** linear meters.



## **Appendices**

1. Archives New Zealand agency documentation
2. Electronic copy of excel spreadsheet detailing records for transfer or destruction

### **APPENDIX 1 – GAIMS Agency Documentation**

Archives New Zealand GAIMS Documentations are attached for agencies covered in this appraisal where they exist.

### **APPENDIX 2 – Disposal Lists**

The disposal lists for records covered by this appraisal have been copied on to CD and supplied with a hard copy of the appraisal report.