



BORD OIDEACHAIS AGUS OILIÚNA CHIARRAÍ  
KERRY EDUCATION AND TRAINING BOARD

## Kerry ETB Data Records Retention Schedule

Records Retention Schedule – Appendix to Records Management Policy for  
Schools/Colleges and other Education and Administrative Centres under the remit of Kerry Education and Training Board.

**Adopted by Kerry ETB on 22<sup>nd</sup> January, 2018**

### Introduction to ETB Records Retention Schedule

The purpose of this schedule is to provide whoever is responsible for managing records in your ETB with a guide as to how long those records should be kept. This will help in keeping records to manageable proportions, both in terms of physical space, and when it comes to attempting to retrieve a record. The schedule will also help your ETB to comply with its obligation under the Data Protection Act to keep personal data for no longer than is necessary for the purpose or purposes for which it was obtained.

The sections of the schedule (tabs in Excel document) reflect the sectoral divisions of a typical ETB, and may therefore need to be adapted or reordered to suit your own ETB's organisational structure and work practices, file management processes, file naming protocols, etc.. For example, some ETBs may not have formally designated which of their former VEC head offices constitutes the ETB HQ. Some Training Centres may have held on to their Finance and Payroll functions. And your ETB may have its own view on where the definitive version of a record is held, e.g. in head office or in the school/centre.

### Certain matters mentioned throughout this schedule that are worth noting that

- a separate section refers to **ESF** retention requirements, and lists those activities to which these apply. These periods 'override' many of the various retention periods set out in this document, i.e. records must be kept for longer
- wherever there is a reasonable expectation that legal action may arise in relation to any particular record, caution should be exercised, and further advice sought before any deletion/destruction is carried out.
- in many cases, the retention period for documents relating to minors only commences where the child reaches the age of 18.
- wherever there are reasonable grounds to expect that a record may be the subject of legal proceedings, the record should be retained and further advice sought.

While the retention and disposal guidelines set out here are a guide to best practice, extending the retention periods should only be done once **a sound and evidence-based business case** exists for doing so, and never for unspecified 'just-in-case' reasons. You should not apply a shorter retention period to any category, but do please send feedback if complying is impractical. Feedback in general is welcomed, especially as this is a first version of what will probably be many future revisions. **FEEDBACK CO-ORDINATOR TO BE DECIDED**

### Disclaimer

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