



CELEBRATING A **10** DECADE
OF REWARDING
REAL-WORLD TRAINING

3-DAY Skills Programme on:

Records Management: Appraisal and Disposal

(Based on US: 259458, NQF Level 4, 8 Credits)

COURSE OBJECTIVES:

- ✓ Understanding of the purpose of having an effective disposal programme as an important element in ensuring effective records management.
- ✓ A basic understanding of the process of appraisal, the various techniques used, abroad and nationally, and various schools of thought on the activity.
- ✓ A basic understanding of the process of macro-appraisal, its advantages and shortfalls.
- ✓ Knowledge of and understanding disposal authorities and their relationship to various sections of legislation associated with records.
- ✓ Understanding of the purpose and process of the office of origin determining the retention periods for records. A basic understanding of the criteria that should be used during this process.

This course is aimed mainly at: Records managers registry staff and registry clerks, work-study officials, business analysts, archivists, information managers and system administrators.

COURSE CONTENTS:

- ✓ Understanding the relevant concepts effecting appraisal, retention and disposal;
- ✓ Duties and responsibilities of record manager in regard to document classification, retrieving and disposal;
- ✓ Classification systems;
- ✓ Understanding appraisal;
- ✓ Appraising policies and practices;
- ✓ Investigations during the appraisal process;
- ✓ Understanding retention;
- ✓ Retention Periods;
- ✓ Understanding disposal
- ✓ Clearing up of records.

COURSE OUTCOMES: After successful completion of this skills programme, the learner will be able to:

- ✓ Define and explain classification systems.
- ✓ Apply classification system(s). (The learner will also be able to create and maintain records according to the classification system and evaluate the classification system and make recommendations to authorised individuals).
- ✓ Evaluate classification systems (in terms of their differences, advantages and disadvantages)



Enquiries: Tel: (012) 654 4288 Fax: (012) 654 8193 or 086 600 2338, Compliments and Complaints: management@lemark.co.za.
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- ✓ Awareness of the necessity of introducing and managing a records management disposal programme
- ✓ Familiarity with various appraisal techniques as well as schools of thought and problems associated with the process.
- ✓ Awareness of the necessity for an organisation to have a clearly defined appraisal policy.
- ✓ Applying the process of macro-appraisal and its relationship to effective recordkeeping systems.
- ✓ Compilation of an appraisal report.
- ✓ Awareness of the various disposal authorities and responsibility of the office of origin.
- ✓ Successful application of criteria in determining retention periods for records.
- ✓ An ability to identify and define the basic terms used in appraisal, retention and disposal; understanding of the importance of effective appraisal, retention and disposal programmes; basic assessment of administrative and enduring values of records; compiling and implementing disposal authorities and determining retention periods.



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