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We are fully SETA accredited and that means you can claim up to 50% of the Course fee back from your SETA, subject to your SETA Terms and Conditions. Contact us for a no-obligation Quotation for groups or In-house Training at: 012 654 4288 or info@lemark.co.za

3-DAY SKILLS PROGRAMME ON:

RECORDS MANAGEMENT: APPRAISAL & DISPOSAL OF RECORDS

03-05 December 2025

Next Dates: TBA 2026

Venue: Centurion/ Pretoria

INTRODUCTION/OVERVIEW:

The process of **appraisal** involves the **evaluation** of **records** to determine whether they possess evidential value and/or informational value. **Records** which have either of these values may have continuing relevance to the creating agency, the whole of government and eventually to the public for research.

WHO SHOULD ATTEND:

This course is aimed mainly at: Records Managers, Registry Staff and Registry Clerks, Work-Study Officials, Business Analysts, Archivists, Information Managers and System Administrators.

MINIMUM ENTRY REQUIREMENTS:

- ❖ It is assumed that learners accessing this qualification are competent in: Communications, Computer Literacy and Mathematical Literacy at NQF Level 3 or its equivalent;
- ❖ Learners attending the course will be required to supply certified copies of their Identity Document and Matric Certificate.

ADDITIONAL ENTRY REQUIREMENT FOR THIS SKILLS PROGRAMME:

- ❖ Learners must have successfully completed a 3 Day Records Management programme or the 2 days E-Records Management Programme.



Enquiries: Tel: (012) 654 4288. **Compliments and Complaints to:** management@lemark.co.za.
Sales Team: sales@lemark.co.za; sales1@lemark.co.za; info3@lemark.co.za or info@lemark.co.za.
Sales Cell: 083 417 3090. PO Box 14047 Clubview, 0014. Website: www.lemark.co.za. Terms & Conditions apply to all LeMark Training Interventions.

PROGRAMME OUTCOME & ASSESSMENT CRITERIA:

After successful completion of this skills programme, self-study and assignment 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)
- ❖ 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
- ❖ 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.

The learner credited for this skills programme will be able to describe the various classification systems and to evaluate them in terms of their differences, advantages and disadvantages. 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.

COURSE CONTENT/OUTLINE:

In this skills programme learners will learn:

- ❖ 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.

PROGRAMME ACCREDITATION:

Please note that this skills programme is currently not aligned to any unit standard and is thus not credit bearing.

ASSESSMENT:

Learners will have to prove their competence in applying the knowledge, skills and behaviour learnt during class exercises and group work. Each learner must submit an assignment within a specific time-frame. **(It is the learner's responsibility to keep a hard copy and/or electronic copy of their assignment as back-up. LeMark will not make or keep any copies of their assignment, nor can we accept any responsibility for the loss thereof).**

ASSIGNMENT ASSESSMENT GUIDE / TEMPLATE:

Each learner will receive a hard copy as well as an electronic copy of an Assignment Assessment Guide/Template. This guide will lead the learner step by step through the assessment process, some important terms as well as what the learner needs to submit in order to be assessed for this course/programme.

RE-SUBMISSIONS:

When a Learner is granted a re-submission they will have 7 days (weekends & holidays included) to complete their PoE/Assignment. Should they not meet this deadline, they will have to book, pay and attend the programme/course at their own expense. Should they yet again be found to be Not Yet Competent (NYC) – the policy prescribes that the Learner will have to re-register for the course.

CERTIFICATION:

The attendance of the first day of class as well as a total minimum of 80% class attendance is compulsory in order to be eligible to hand in your PoE/ Assignment. After the successful completion of this skills programme and the portfolio of evidence (PoE), learners will receive a **LeMark Certificate of Competence**. Alternatively learners will receive a **LeMark Letter of Attendance**.

RATE: R7 795.00 (Incl. VAT) Per Learner (Breakfast, Lunch, Refreshments & Study Material).

VENUE: Centurion/Pretoria.

REFERENCE NUMBER: Please Use Your Invoice Number.

CLOSING DATE FOR REGISTRATION: Last Working Day before Programme Starts.

CANCELLATION DATE: 7 Working Days before Programme Starts.



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- **The Client** – means the learner the quote/marketing outline is addressed to and the training/consultation will be done for.

On acceptance of this quotation for services to be rendered as per marketing letter outline, the Service Provider (LeMark Training & Development Pty Ltd) shall retain ownership in the copyright in its pre-existing intellectual property, in particular the copyright in the Training Manual/Modules, as well as its working papers and, for purposes of clarity, shall own its methodologies and intellectual property on its investigative techniques, evidence collection methods, skill, expertise etc.

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- **The Client** undertakes not to attack, or support an attack, on the ownership of the copyright in the Training Materials/Manual/Modules of the Service Provider and to promptly report any possible infringements thereof to the Service Provider.
- **The Client** undertakes not to use, amend, modify or alter the Training Materials/Manual/Modules, without the express written permission of the Service Provider.

TERMS, CONDITIONS & DISCLAIMER:

- **Admission conditions and cancellation policy applies.** For full details contact LeMark Training & Development (Pty) Ltd (LeMark) or visit our web site: www.lemark.co.za. LeMark reserves the right to postpone/reschedule or cancel **SCHEDULED skills programmes or courses** should the number of bookings not justify the presentation of the event. **The liability** of LeMark in the event of a skills programme, seminar or course being cancelled will be limited to a refund of the event fees to the delegate.
- **An official booking form confirmation (LeMark Complete Registration Form) must be received from the Customer in order to reserve a place for all the LeMark Scheduled Training Programmes.**
- **Prior to the receipt, acceptance and acknowledgement by LeMark of your confirmation/ booking (registration form/s), you will not be deemed as booked. (Please refer to Booking Procedure and Confirmation Instructions).**
- **It is the responsibility of the Customer to enquire should they not receive a confirmation from LeMark after they have submitted a registration form or payment for training.**
- **We reserve the right to change the venue and the order of the presentation or, if absolutely necessary, to substitute a facilitator or presenter.**
- LeMark is **ACCREDITED by the SERVICES SETA** as an institution delivering quality education and training - Provider. Entity Number: (0149)2010/002646/02 (was 2001/025985/23).
- **Price and availability** is subject to change without notice; although we try to assure accuracy, LeMark cannot be responsible for typographical or photo errors on our website, electronic and printed material.

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The first principle toward which LeMark strives is total client satisfaction. Our full promise to you is listed on our website www.lemark.co.za. We would love to hear from you, our valued client, if you feel we are not fulfilling our promise to you!

**Please Note: The LeMark Course Rate Includes:
Provision of Training & Certification Costs!**



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