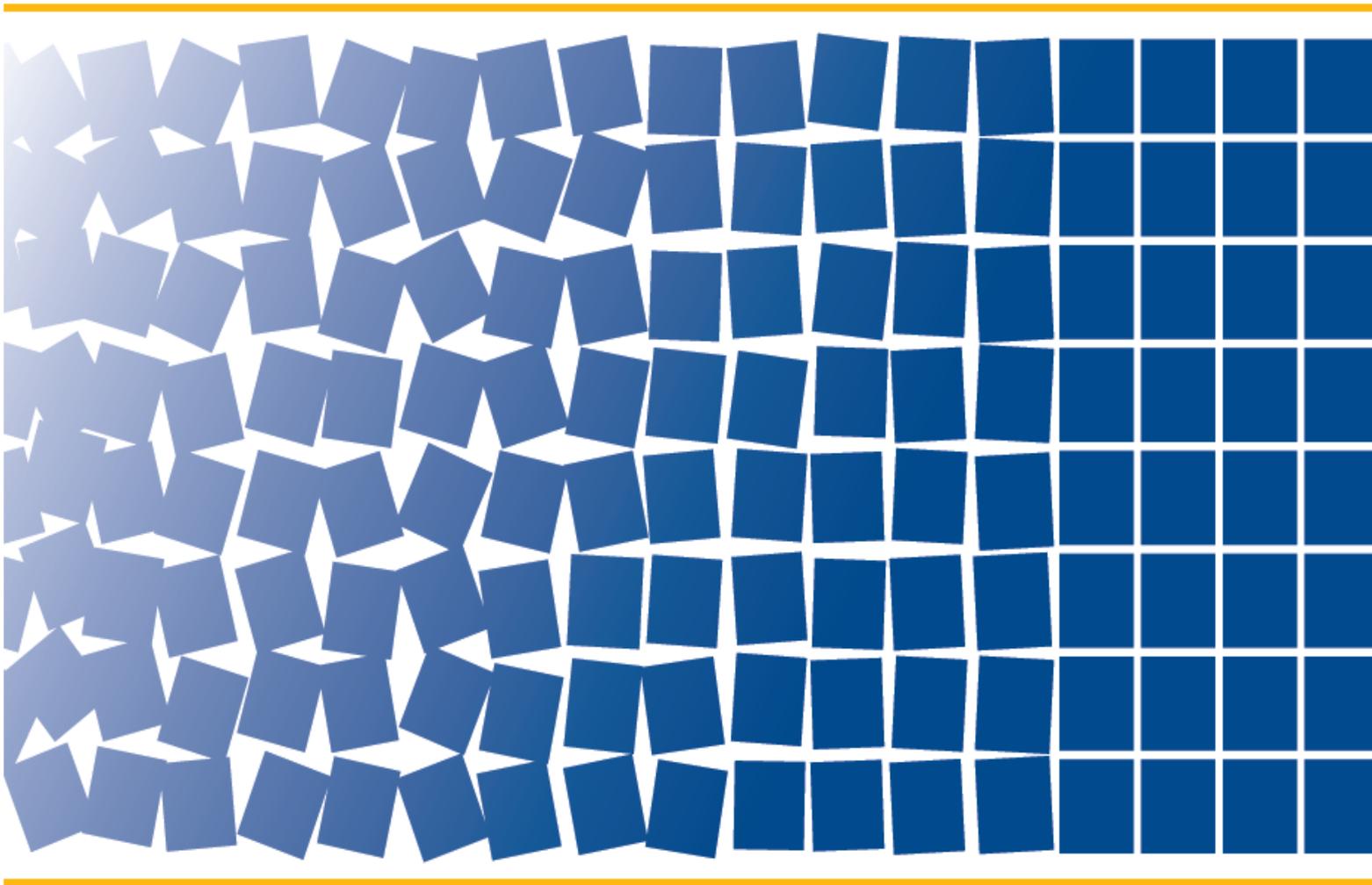


EDUCATION DATA REPORTING AND ANALYTICS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM



GOVERNMENT RECORDS SERVICE

INFORMATION SCHEDULE APPROVAL

Title: *Education Data Reporting and Analytics Operational Records Classification System (ORCS)*

Ministry of Education
Governance and Analytics
Analysis and Reporting

Scope of Schedule:

This schedule covers records relating to the use of data and research to assist the ministry in decision making, program delivery and evaluation. This includes: the production of standard annual reports on student achievement and demographics, and ad hoc reports in response to requests from the ministry, other government organizations, and the public; forecasting and program evaluation; the administration of the Satisfaction Survey, which gathers responses from students, parents/guardians, and school staff on achievement, human and social development, and safety and demographics; and the sharing and release of data to academic researchers through research agreements.

This schedule also covers records relating to the coordination, reporting and analysis of the CommunityLINK (Learning Includes Nutrition and Knowledge) program, which provides funding to support the academic achievement and social functioning of vulnerable students.

The retention periods specified in this schedule meet all operational, fiscal, legal, and audit requirements. For more information, see the attached schedule.

Earliest date of records covered by this schedule: 1999

The government body endorses this schedule and its implementation.

Endorsement on file

2017/04/18

Executive Director, Education Analytics
Name: Darlene Therrien

Date

The attached schedule was developed in consultation with staff and managers who conduct the operational functions in the creating agency. It has also been reviewed by appropriate Government Records Service staff to ensure it meets scheduling and appraisal standards, and reflects sound recordkeeping practices.

Schedule Developer: Mahia Frost
Archivist: Joni Mitchell

Endorsed by Government Records Service

The Information Management Advisory Committee recommends this schedule for approval.

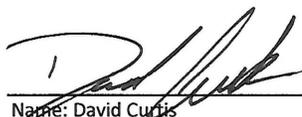


2017/10/16

Susan Laidlaw, Chair

Date

APPROVED BY THE CHIEF RECORDS OFFICER:



2018/01/22

Name: David Curtis

Date

Endorsement on file

Name: Alex Wright
Date 2017-03-20

USEFUL INFORMATION

Key to Information Schedule Codes and Acronyms:

Information Schedule titles:	ARCS = <i>Administrative Records Classification System</i> ORCS = <i>Operational Records Classification System</i>
Office information:	OPR = Office of Primary Responsibility
Records life cycle:	A = Active SA = Semi-active FD = Final Disposition
Active and semi-active period codes:	CY = Calendar Year FY = Fiscal Year NA = Not Applicable SO = Superseded or Obsolete w = week m = month y = year
Final disposition categories:	DE = Destruction FR = Full Retention SR = Selective Retention OD = Other Disposition NA = Not Applicable
Special flags:	FOI = Freedom of Information/Protection of Privacy PIB = Personal Information Bank VR = Vital Records

The following links provide additional resources for managing your information:

- [ARCS and ORCS User Guide.](#)
- [Special schedules for records that are not covered by ARCS and ORCS.](#)
- [Legislation, policies, and standards for managing records in the BC Government.](#)
- [Tips, guides, and FAQs on related topics.](#)
- [Records Officer contact information.](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SECTION 1

EDUCATION DATA REPORTING AND ANALYTICS

PRIMARY NUMBERS

15000 – 15499

This ORCS covers records related to the use of data and research to support program and strategic planning, data enabled decision making, and system performance evaluation. The branch is the data steward for the Education Data Warehouse; using advanced analytics and interpretation of that data, they provide statistical and research information on the K-12 (kindergarten to grade 12) education system to the ministry, government and education sector.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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SECTION 1 TABLE OF CONTENTS
EDUCATION DATA REPORTING AND ANALYTICS

15000 - 15499

15000	EDUCATION DATA REPORTING AND ANALYTICS
15200	COMMUNITYLINK PROGRAM MANAGEMENT

15000 EDUCATION DATA REPORTING AND ANALYTICS

Records relating to the use of data and research to assist the ministry in data-enabled decision making, program delivery and evaluation.

The Education Data Warehouse (EDW) is the primary data source for analysis and reporting functions. Using a variety of methods of analysis and interpretation, staff provide a “reporting” service to communicate statistical and research information related to student performance and the performance of the K-12 (kindergarten to grade 12) education system as a whole. Examples of topics these reporting data cover are student completion rates, student performance, classroom size and composition, and enrolment.

Analysis and reporting projects generally fall into three categories. Standard reporting focuses on the consistent annual reporting of student achievement and demographic data, covering topics such as class size and composition, Satisfaction Survey, and Foundation Skills Assessment or course results. Ad hoc reporting is request based and provides information and analysis support for both the ministry and the public; these projects can vary widely in scope, from producing a small set of statistical numbers, to reviewing documents with statistical elements, to producing program-wide statistical reports.

Forecasting and evaluation projects apply analysis and interpretation of data to guide strategic directions and recommend course correction when needed. These projects contain the development of a variety of evaluation and analytic methods such as economic, statistical, forecasting, and predictive analysis, to help shape the planning, delivery and reporting for education related services provided across the province.

Also included in this primary are the records relating to the Satisfaction Survey program, which is administered annually as part of the ministry accountability cycle. The survey gathers responses from students, parents/guardians, and school staff on achievement, human and social development, safety and demographics. Some of the topic areas covered by the Satisfaction Survey include: achievement, school climate, healthy living, and safety. The analysis of responses is standard annual reporting.

Stewardship of data within the Education Data Warehouse includes managing the sharing and release of data to authorized recipients (e.g., general public, government partners, academic researchers, the First Nations Education Steering Committee, and legislated representatives such as the Representative for Children and Youth), according to the requirements of all applicable legislation, government and ministry policy. This process is managed through information and data sharing agreements, as well as research agreements, which are covered under this primary.

NOTE: EDW raw data extracts and quality assurance extracts that aren't required to provide point in time reference are subject to special schedule 102902 [Transitory Electronic Data Processing \(EDP\) Records](#) and should be deleted when no longer required.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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For change requests see [ARCS secondary 6840-20](#).
 For data integration and quality assurance projects see [ARCS secondary 6450-20](#).
 For EDW maintenance see [ARCS primaries 6450](#), and [6820](#).
 For information sharing and data sharing agreements see [ARCS primary 146](#).
 For lists and registers see [ARCS secondary 100-05](#).
 For metadata documentation, such as MetaBadger data, see [ARCS secondary 6450-80](#).
 For presentations see [ARCS secondary 324-40](#).
 For Privacy Impact Assessments (PIA's) see [ARCS secondary 293-60](#).
 For query library (of EDW search scripts) see [ARCS secondary 358-20](#).

The ministry OPR is Education Analytics unless otherwise noted below. See specific secondaries for OPR retention schedules.

15000	EDUCATION DATA REPORTING AND ANALYTICS	A	SA	FD
All non-OPR offices will retain these records for:		SO	nil	DE
-00	Policy and procedures (covers final/approved versions of policies, procedures, standards, and guidelines pertaining to this function)	SO	5y	FR
	SO: when the policy is replaced or becomes irrelevant			
	FR: The government archives will fully retain final versions of operational policy documentation because these provide significant evidence of the governance of the functions and programs covered by this schedule.			
-01	General	CY+1y	nil	DE
	NOTE: Throughout this schedule, this secondary covers miscellaneous records that relate to the primary but do not document decisions and actions, and do not relate to topics that warrant specific classifications.			
-05	Education Data Warehouse (EDW) data (covers data in the EDW; this data is used for reporting and statistical analysis to support various functions throughout the ministry)	SO	nil	DE
	SO: when the data is no longer required for analytical and statistical reporting			
	NOTE: See the System Overview section for information on the EDW.			
-10	Research, standard, published reports and other special	SO	nil	FR

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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15000	EDUCATION DATA REPORTING AND ANALYTICS	A	SA	FD
	<p>products (covers standard reporting [annual analytical reports and data releases] and special data products about student achievement and demographics in the provincial K to 12 education system, including associated glossaries; also covers satisfaction survey reports)</p> <p>SO: when a minimum of 20 years has elapsed, and reference value for trend analysis has expired</p> <p>FR: The government archives will fully retain research, standard, published reports and other special products. These records serve as the Ministry of Education's primary source of information about student achievement and demographics in the British Columbia kindergarten to grade 12 education system. They provide evidence of what information the ministry collects, collates, uses, and makes available to its education system partners and stakeholders. The reporting products also have significant informational value in that they are a stable source of trend data on the education experience, and they provide ongoing province-wide statistical data about student performance, classroom size and composition, student composition, enrolment, teachers and administrators, and graduation rates.</p> <p>NOTE: The retention provides for statistical, research and trend analysis from pre-kindergarten through entry into post-secondary institutions.</p> <p>NOTE: Classify project records relating to the production of these data products under 25 Data analysis and reporting - surveys, research, and standard reporting projects.</p>			
-20	<p>Data analysis and reporting - ad hoc projects (includes correspondence, queries, generators, report templates, final products, and may include "data from client", which is the criteria and framework information for the request) (arrange by project number) (covers data and statistical analysis projects that collect, project, analyse, compile, and distribute education information to the public, other ministries, and internal ministry program areas on an ad hoc basis)</p> <p>SO: the project file is closed when the following criteria</p>	SO	nil	DE

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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15000	EDUCATION DATA REPORTING AND ANALYTICS	A	SA	FD
	<p>have been met:</p> <ul style="list-style-type: none"> external requests (including other ministries' requests); when the final output has been delivered, plus three years internal ministry requests; when the final output has been delivered to the program area, plus five years <p>NOTE: These project files contain the final products prepared for and distributed to program area clients within the ministry. It is the responsibility of the ministry program areas to retain their copy of the final products (often reports) in their record keeping system, as these project files are kept only for the duration of time required for the project's reference purposes</p>			
-25	<p>Data analysis and reporting - surveys, research, and standard reporting projects (includes correspondence, queries, generators, report templates) (arrange by project number) (covers the indepth data and statistical analysis projects that collect, project, analyse, compile, and distribute education information on a regular basis to the public, and also internally. These are commonly referred to as standard reporting, but also include surveying functions such as the satisfaction survey and other in-depth research and analysis projects)</p> <p>SO: the project file is closed when the following criteria have been met:</p> <ul style="list-style-type: none"> surveys, standard, and public reporting projects that are produced on an annual basis; when the final output has been produced, a minimum of five years has elapsed, and informational value has expired analytical reporting in support of labour negotiations, when it has been at least 4 cycles of negotiations and no longer required for reference <p>NOTE: The retention for surveys, standard and public reporting projects ensures the project files are available for the production of 5 year trend reports, which are commonly produced. The operational value for most of these project files extends beyond 5 years.</p>	SO	nil	DE

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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15000	EDUCATION DATA REPORTING AND ANALYTICS	A	SA	FD
	NOTE: Standard and public reporting and special products (which may take the form of formalized reports or data), their associated glossaries, and survey reports are classified under -10, where they are fully retained for the government archives.			
-30	Forecasting and evaluation projects (includes correspondence, queries, report templates and development, and final products) (arrange by project number) (covers the analysis and interpretation of data to guide ministry strategic directions and recommend course correction, also focusing on the development of predictive analysis and forecasting) SO: the project file is closed when a minimum of 7 years has passed since project completion, and when informational and trend analysis value has expired	SO	nil	DE
-35	Policy and procedures development files (includes briefing notes, correspondence, drafts and working materials) SO: when the policy is approved and distributed, or abandoned DE: Policy development files may be destroyed because final policies are fully retained under secondary -00.	SO+5y	nil	DE
-40	Report, survey, and data analysis model development (includes correspondence, supporting documentation, queries and query results) (arrange by type of report) (covers the development and framework of standard and public reports, the exploration and development of new reporting methods such as open data or data visualization development; and the development of surveys) SO: when no longer required to understand the rationale and context for the report or reporting method, or when report is no longer produced, or project has been abandoned NOTE: Most of the project files for producing these reports/surveys/datasets are classified under -25 Data analysis and reporting - surveys, research, and standard reporting projects; the final reporting products are classified and fully retained under -10	SO	nil	DE

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This is an approved information schedule, as defined by the [Information Management Act \(SBC 2015, c. 27\)](#). For more information consult your [Records Officer](#).

15000	EDUCATION DATA REPORTING AND ANALYTICS	A	SA	FD
	Research, published reports and other special products.			
-45	Research agreements (includes agreement and supporting documentation, associated projects, amendments, correspondence) (arrange by year agreement negotiation is started, then by project number) (covers the development, management and monitoring of research agreements with academic institutions and researchers) SO: when the agreement and renewals have expired, and all contractual obligations such as data destructs have been met; or, for unsigned agreements, when agreement negotiations have been abandoned 7y: The retention period is consistent with the government standard for the retention of agreements and contracts, and provides a reference period for staff in negotiating subsequent agreements. It also provides a grace period for abandoned agreements, in the event, for example, that the researcher obtains funding and can proceed with the research project. NOTE: The ministry has information sharing agreements with agents at University of British Columbia who are authorized to provide educational data to researchers. Although these agents provide the data, researchers are vetted by the ministry and enter into research agreements with the ministry before information is released to them.	SO+7y	nil	DE

END OF PRIMARY

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This is an approved information schedule, as defined by the [Information Management Act \(SBC 2015, c. 27\)](#). For more information consult your [Records Officer](#).

15200 COMMUNITYLINK PROGRAM MANAGEMENT

Records relating to the coordination, reporting and analysis of the CommunityLINK (Learning Includes Nutrition and Knowledge) program, which provides funding to support the academic achievement and social functioning of vulnerable students. Programs and services can include breakfast, lunch and snack programs, academic supports, counseling, youth workers and after-school programs.

Funding is provided to all school districts in the province. School boards make the decisions about funding distribution to specific programs and services so that the needs of individual students and local communities are met. Every year, school districts are required to report on CommunityLINK results, evaluation, funding and expenditures to the ministry.

For agreements with non-profit partners see [ARCS primary 146](#).

For audits see [ARCS primary 975](#).

For general liaison records with districts and community partners, see [ARCS secondary 230-20](#).

For grant accounting files and funding transfer requests see [ARCS primary 1150](#).

For handbooks or guidelines developed for schools on administering the program see [ARCS primary 312](#).

For the integration of the Social Service Indices, see [ARCS secondary 6450-20](#).

For lists, such as contact lists, see [ARCS secondary 100-05](#).

For reference material/topical files see [ARCS secondary 358-20](#).

The ministry OPR is Education Analytics unless otherwise noted below. See specific secondaries for OPR retention schedules.

15200	COMMUNITYLINK PROGRAM MANAGEMENT	A	SA	FD
	All non-OPR offices will retain these records for:	SO	nil	DE
-00	Policy and procedures (covers final/approved versions of policies and procedures and guidelines pertaining to this program, including the funding formula and funding tables)	SO	5y	FR
	SO: when the policy is replaced or becomes irrelevant			
	FR: The government archives will fully retain final versions of operational policy documentation because these provide significant evidence of the governance of the functions and programs covered by this primary.			
-01	General	CY+1y	nil	DE
-05	CommunityLINK annual district reports (covers mandatory district reports on the results, activities and	FY+7y	nil	DE

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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15200	COMMUNITYLINK PROGRAM MANAGEMENT	A	SA	FD
	expenditures from CommunityLINK funding)			
	8y: the retention period provides for audit and fiscal accountability requirements.			
-07	CommunityLINK program evaluation and summary reports (covers analytical and summary reports created by the ministry to track the program activities and funding trends; also covers ad hoc in-depth district reporting, such as the 2008/2009 CommunityLINK Report School District, which share information on innovative practices and evaluation tools that are funded through CommunityLINK)	SO	nil	DE
	SO: when the program is closed, or when no longer required for statistical, research and program analysis purposes, and a minimum of seven years has elapsed			
-25	Master Insurance Program (MIP) documentation (covers the facilitation of school district MIP applications on behalf of eligible agencies/contractors who are providing CommunityLINK funded social services and programs) (includes copies of the insurance application form, fully executed service contracts and associated correspondence)	FY+2y	nil	DE
	3y: While the ministry facilitates the application and amendment process for the applicant, the MIP agreement is between the MIP program and the insured; the ministry is not a party in the agreement. The retention provides adequate time for the ministry to confirm to the insurer that the applicant is eligible for MIP, and ensures the records are available for reconciliation purposes.			

END OF PRIMARY

[Key to ARCS/ORCS Codes and Acronyms](#)

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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EDUCATION DATA REPORTING AND ANALYTICS

OPERATIONAL RECORDS CLASSIFICATION SYSTEM (ORCS)

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OPERATIONAL RECORDS CLASSIFICATION SYSTEM

This is an approved information schedule, as defined by the [Information Management Act \(SBC 2015, c. 27\)](#). For more information consult your [Records Officer](#).

SYSTEM SECTION: COMMON SYSTEM NOTES

Retention Schedules for the Systems

The data on the systems is classified under appropriate secondaries in the *ORCS* and in *Administrative Records Classification System (ARCS)*, as indicated in the following descriptions. The systems themselves are all scheduled as follows:

Active	SO:	The system becomes superseded and obsolete when all data has been migrated to another system or documented elsewhere, or when all applicable retention schedules for the data have expired; see relevant classifications.
Semi-Active	nil:	There is no semi-active retention period assigned to data in the systems.
Final Disposition	DE:	Each system will be destroyed when all data has been migrated to another system performing the same function, schedules covering the data have elapsed, or the data has been preserved elsewhere. For data retention details, see the applicable system overview.

EDUCATION DATA WAREHOUSE

SYSTEM OVERVIEW

Creating Agency

Ministry of Education
Governance and Analytics Division
Education Analytics Branch

Purpose

Implemented in 2002, the Ministry of Education Data Warehouse (EDW) was created to be a central source of information for reporting results and performing research. The objective was to have the information that was coming from separate sources integrated into one source using consistently applied business rules, and then reported using consistent measurement definitions.

Information Content

The EDW contains information from a variety of source systems, and contains information such as:

- Schools and their authorities (e.g. a Public School Board or an Independent School Authority)
- Students enrolled in B.C. schools
- Programs funded by the Ministry, in which students are enrolled
- Provincial examination results
- Student achievement data, such as graduation, scholarship, Foundation Skills Assessment results and Grade 10, 11 and 12 course results
- Satisfaction Survey results
- Basic demographics information on school teachers and administrators for both public and independent schools
- Salary information on public school teachers and administrators by school board
- Number of "full-time-equivalent" students that were funded by the Ministry, per certain groupings (e.g. adult education, special needs, etc.) per school board.
- Estimates of enrolments per school board for the next ten years (called enrolment projections)
- Enrolment and credential achievement information for BC Post Secondary Institutions (used for high-school to post secondary institution [PSI] transition measurements)
- Population statistics per school district and school surrounding area. The initial information is produced by BC Stats, and then is derived into information by district and school area, by the Ministry of Education
- Funding information
- Aboriginal Bands and Enhancement Agreements with the bands.

Inputs, Processes, and Outputs

There are many data sources for the EDW; data feeds into it from multiple internal systems throughout the ministry, such as TRAX, PEN and several others; and also from external data sources, such as ministries of Advanced Education, and Social Development and Social Innovation. Data is integrated into the system by first cleaning and "packaging" the data objects into data warehouse format. The data in the warehouse is then queried by data analysts to provide data driven information to ministry executive and program areas, create standard annual reports and conduct ad hoc reporting which is responsive to the issues of the day.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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The branch is in the planning phase of updating the Oracle based operating platform for the EDW. When this process is complete the content of the data warehouse will be the same, but the processes and querying methods will be quite different, with more sophisticated data integration processes and output tools, as well as point in time search capabilities. Because of this technology shift, this system overview won't detail system processes and outputs which will operate differently by the time of schedule approval.

OPERATIONAL RECORDS CLASSIFICATION SYSTEM

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EDUCATION DATA WAREHOUSE

Classification of Records that Relate to the System

Schedule Code	Secondary No.	Secondary Title	Retention Schedule		
			A	SA	FD
Data in the System					
EDRA	15000-05	Education Data Warehouse (EDW) data	SO	nil	DE
Inputs					
		<i>Inputs come from multiple systems throughout the ministry, which aren't covered by a records schedule at this time.</i>			
ARCS	6450-20	IT projects (covers data integration and quality assurance projects, as well as development of metadata documentation)	SO	2y	DE
Outputs					
EDRA	15000-10	Research, standard, published reports and other special products	SO	nil	FR
EDRA	15000-20	Data analysis and reporting - ad hoc projects	SO	nil	DE
EDRA	15000-25	Data analysis and reporting - surveys, research, and standard reporting projects	SO	nil	DE
EDRA	15000-30	Forecasting and evaluation projects	SO	nil	DE
Other Related Records					
ARCS	6820-05	Back-up data	SO	nil	DE
ARCS	6450-80	IT application/system documentation - final versions	SO	2y	SR
ARCS Section 6 102902	see appropriate secondaries	INFORMATION TECHNOLOGY Transitory Electronic Data Processing (EDP) Records	SO	nil	DE

Schedule Code Key: ARCS = *Administrative Records Classification System*, schedule 100001
EDRA = *Education Data Management and Analytics*, schedule 195780

END OF OVERVIEW