

Records Management Policy and Retention Schedule

June 2019

The School recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution.

Prepared by: Deputy Headteacher

Discussed with: HT & SBM (June 2019)

Agreed with: Governing Body through shared website (June 2019)

To be Reviewed and Updated: June 2021

Record Management

Records provide evidence for protecting the legal rights and interests of the school, and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited.

The School has adopted the Information Management Tool Kit for Schools created by the IRMS (Information and Records Management Society) and adheres to its principles and guidance. A full copy of the ToolKit is available on the School website.

The policy covers:

- Scope
- Responsibilities
- Relationships with existing policies

1. Scope of the policy

- 1.1 This policy applies to all records created, received or maintained by staff of the school in the course of carrying out its functions.
- 1.2 Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.
- 1.3 A small percentage of the school's records may be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the Croydon Archives Service.

2. Responsibilities

- 2.1 The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Headteacher.
- 2.2 The person responsible for records management in the school will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.
- 2.3 Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.

3. Relationship with existing policies

This policy has been drawn up within the context of:

- Freedom of Information policy
- Data Protection policy
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.