



The Bromstone Primary and St Mildred's Infant School Federation

School Records Management Policy and Retention Schedule

Senior Team Responsibility: Business Manager

Governors' Reviewing Committee: Behaviour and Safety

Approved on: July 2023

Reviewed: June 2025

Next Review Date: July 2026

Associated Documentation: Information Management toolkit for Schools, GDPR Policy

Introduction

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 school. The school has adopted the **Information Management toolkit for Schools** and adheres to its principles and guidance. A printed copy of the retention schedule is attached as Appendix 1 to the hard copy of this policy.

Rationale

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 is achieved and can be audited.

1 Aims and Objectives 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 can be created or received, then stored, in hard copy or electronically.

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 the overall responsibility for this policy is the School Business Manager (SBM).

2.2 A copy of the Information Management Toolkit for Schools (IRMS) is very comprehensive and is located in the policy folder and the school office for ease of access. However, should there be some uncertainty, the SBM will give guidance about good records management practice.

2.2 The person responsible for records management in the school will give guidance for good 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 maintained and disposed of in accordance with the school records management guidelines.

3 Data Retention

3.1 Personal Data is retained by the school in line with its General Data Protection Regulation Policy and the Data Protection Schedule which lists all the categories of data held by the school and its retention period. Further information on this can be obtained by contacting the School Business Manager

Relationship with existing policies

This policy has been drawn up within the context of:

- Information Management Toolkit for Schools (IRMS)
- Freedom of Information Policy
- General Data Protection Regulations (GDPR)
- Acceptable Use of ICT Policy
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.