



Bromstone Primary School & St Mildred's Primary Infant School

Records Management and Retention Schedule

Formulation date: 1st September 2014

Senior Team Responsibility: Business Manager

Governors' Reviewing Committee: Leadership and Management

Approved on: 12th July 2023

Next Review Date: July 2024

Associated Documentation:

- Information Management Toolkit for Schools (IRMS) [Records management - KELS](#)
- Freedom of Information Policy
- Data Protection Policy
- Acceptable Use of ICT Policy
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

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Records Management Policy and

Retention Schedule

Introduction

Bromstone Primary School & St Mildred's Primary Infant School recognise that by efficiently managing it's records, they will be able to comply with their legal and regulatory obligations and to contribute to the effective overall management of the schools. The schools have adopted the **Information Management toolkit for Schools** and adhere to its principals 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 both schools 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 Bromstone Primary School & St Mildred's Primary Infant School in the course of carrying out their functions.

1.2 Records are defined as all those documents which facilitate the business carried out by the schools 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 schools have a corporate responsibility to to maintain their 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 at both schools.

2.2 A copy of the Information Management Toolkit fort 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 either 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.

Relationship with existing policies

This policy has been drawn up within the context of:

- Information Management Toolkit for Schools (IRMS) [Records management - KELSI](#)
- Freedom of Information Policy
- Data Protection Policy
- Acceptable Use of ICT Policy
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

Signed.....Date.....

Chairman of the Governors

Signed.....Date.....

Headteacher