

ENGLISH MARTYRS' CATHOLIC PRIMARY SCHOOL



Records Management Policy

2024-2025

Our English Martyrs' School community aims to follow the example of Christ in welcoming, recognising, fostering and developing each individual as a unique and special gift of GOD with value and dignity

Introduction

English Martyrs' RC Primary 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. 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. This policy supports the school in meeting its responsibilities under the General Data Protection Regulation and the Data Protection Act 2018. The policy is created from a template provided by the Information and Records Management Society.

This policy covers:

- Scope
- Responsibilities
- Relationships with existing policies

Scope of the Policy

- This policy applies to all records created, received or maintained by staff of the school in the course of carrying out its functions. Also, by any agents, contractors, consultants or third parties acting on behalf of the school.
- 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, and then stored, in hard copy or electronic format e.g. paper documents, scanned documents, e-mails which document business activities and decisions, audio and video recordings, text messages, notes of telephone conversations, presentations etc.
- 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 local county archives centre.

Roles and Responsibilities

Governors:

The Governing Body has a statutory responsibility to maintain the school records and record keeping systems in accordance with the regulatory environment. The Governing Body has delegated this overall responsibility to the Headteacher. The Chair of Governors takes an active role in meeting regularly with the Headteacher and School Business Manager ensuring records are kept up to date.

Headteacher:

The Headteacher is responsible for day-to-day operational management in the school and will give guidance about 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.

All Staff:

Individual staff and employees must ensure, with respect to records for which they are responsible, that they

- Manage the school's records consistently in accordance with the school's policies and Procedures
- Properly document their actions and decisions
- Hold personal information securely
- Only share personal information appropriately and do not disclose it to any unauthorised third party
- Dispose of records securely in accordance with the school's Records Retention Schedule.

Relationship with Existing policies

This policy has been drawn up within the context of:

- Freedom of Information Publication Scheme
- Data Protection Policy
- With other legislation or regulations (including audit and equality and ethics) affecting the school.

Retention Schedule

English Martyrs' RC Primary School refers to the Retention Guidelines as detailed in the Information and Records Management Society

In summary retention periods for the various types of record that school holds are as follows:

- Pupil and parent records are passed on to the next school
- School management – finance records are generally kept for the current year plus 6 years, with exceptions
- School management – HR/personnel records are generally kept for 7 years from the end of employment and 25 years following a dismissal.
- Governance Records are kept for the current year plus 6 years, with the exception of Instruments of Governance which are kept for the life of the school
- Government and Local Authority returns are retained as required by statute;

This list is provided as a summary only and the IRMS Toolkit should be referred to for detail on all record retention periods.