



# Tannery Drift First School

Enjoyment – Achievement – Respect

# School Records Management Policy

Last Review Date:  
June 2024

Next Review Date:  
June 2027



Artsmark  
Gold Award  
Awarded by Arts  
Council England

[www.tannerydrift.herts.sch.uk](http://www.tannerydrift.herts.sch.uk)

# School Records Management Policy

## 1. Policy statement and objectives

Tannery Drift First 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 the effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Digital Continuity
- Relationships with existing policies

## 2. Scope of the policy

2.1 This policy applies to all records created, received or maintained by permanent or temporary staff of Tannery Drift First School in the course of carrying out its functions. Also, by any agents, contractors, consultants or third parties acting on behalf of the school.

2.2 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.

2.3 A small percentage of the school's records may be selected for permanent preservation as part of the school's archives. The school archive is maintained as a resource to help inspire and equip current staff and pupils to understand and appreciate issues of identity, belonging and shared heritage; to prompt memories of school-life; and to serve as a research resource for all interested in the history of the school and the community it serves.

## 3. Responsibilities

3.1 Tannery Drift First School has a statutory responsibility to maintain its records and record keeping systems in accordance with the regulatory environment specific to the school. The person with overall responsibility for this policy is the Headteacher.

3.2 The person responsible for day-to-day operational 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.

**3.3** The person responsible for records management will also ensure that:

- records are adequately stored and backed up
- a tracking system is in place that controls the movement and location of records so that they can be easily retrieved
- access controls are in place
- a business recovery plan is in place

**3.4** The school will manage and document its records disposal process in line with the Records Retention Schedule. This will help to ensure that it can meet Freedom of Information requests and respond to requests to access personal data under data protection legislation (subject access requests 'SARS').

**3.5** Individual staff and employees must ensure that, 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.

#### **4. Digital Continuity**

Computerised data that must be kept for six or more years will be identified, and stored appropriately:

- This data will be stored in online backup systems.
- The data may be archived to a dedicated location on the school's server, which is password-protected
- This data will not be stored on flash drives.

Where possible, files will be converted to appropriate supported file formats for long-term preservation e.g. Word and Excel files may be converted to PDF files.

#### **5. Relationship with existing policies**

This policy has been drawn up in the context of:

- Freedom of Information policy
- Data Protection policy

- Any legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

## **6. Enquiries**

Further information about the School's Data Retention Policy is available from the DPO via [dpo@tannerydrift.herts.sch.uk](mailto:dpo@tannerydrift.herts.sch.uk)

General information about data protection regulations can be obtained from the Information Commissioner's Office: [ico.org.uk](http://ico.org.uk)



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