



Records Management Policy

Holy Trinity C of E 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 institution. 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 and should be read in conjunction with the Data Protection and Freedom of Information policies. It 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 Holy Trinity C of E Primary 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 Holy Trinity C of E Primary School and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created or received, and then stored, in hard copy or electronically.
- 1.3 A small percentage of the schools 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.

2 Responsibilities

- 2.1 The Holy Trinity C of E Primary 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 Head of School.
- 2.2 The person responsible for records management in the school 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.
- 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 Holy Trinity C of E Primary School

Holy Trinity C of E Primary School has adopted the Records Management Society of Great Britain's Tool Kit for Schools Version 5 (updated in 2016).

<http://www.irms.org.uk/grkroups/public-sector/resources/134-records-management-toolkit-for-schools>

4 Related Policies

Freedom of Information
Data Protection
Single Equality Scheme

The Governing Body approved this policy on date: **27th November 2017**

Signed: 

Chair of Governors

Signed: 

Head Teacher