




Meath School Records Management Policy

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3		
4		

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Committee	FGB
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Signed	

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Non-Maintained School | DfE No. 936/7063

Meath, is a Speech and Language UK school. Speech and Language UK is the operating name of I CAN Charity, a registered charity in England and Wales (210031) and Scotland (SC039947), which is a company limited by guarantee registered in England and Wales (00099629). Registered address: 2 Angel Gate, Hall Street, London, ECTV 2PT

Meath School Records Management Policy

Meath 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. It covers:

- Scope
- Responsibilities
- Relationships with existing policies
- Retention

1. Scope 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. Also, by any agents, contractors, consultants or third parties acting on behalf of the school.

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 may be created, received or maintained in hardcopy 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 and Skype conversations, spreadsheets, Word documents, presentations etc.

2. Responsibilities

2.1 The Trustees of Speech and Language UK have a statutory responsibility to maintain the school records and record keeping systems in accordance with the regulatory environment specific to the school. The person with overall responsibility for this policy is delegated to the Principal.

2.2 The person responsible for day-to-day operational management in the school will give guidance on 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 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").

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

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

3. Relationship with existing policies

This policy has been drawn up within the context of:

- Data Protection policy and Privacy Notice
- with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

Signed: _____

Date: _____

Majella Delaney, Principal

Review Date: _____

Data Retention Policy

The School has a responsibility to maintain its records and record keeping systems. When doing this, the School will take account of the following factors:

- The most efficient and effective way of storing records and information;
- The confidential nature of the records and information stored;
- The security of the record systems used;
- Privacy and disclosure; and
- Their accessibility.

This policy does not form part of any employee's contract of employment and is not intended to have contractual effect. It does, however, reflect the School's current practice, the requirements of current legislation and best practice and guidance. It may be amended by the School from time to time and any changes will be notified to employees within one month of the date on which the change is intended to take effect. The School may also vary any parts of this procedure, including any time limits, as appropriate in any case.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems

DATA PROTECTION

This policy sets out how long employment-related and pupil data will normally be held by us and when that information will be confidentially destroyed in compliance with the terms of the General Data Protection Regulation (GDPR) and the Freedom of Information Act 2000.

Data will be stored and processed to allow for the efficient operation of the School. The School's Data Protection Policy outlines its duties and obligations under the GDPR.

Suspected data breaches must be reported to the Data Protection Officer: Satswana info@satswana.com 01252 516898

RETENTION SCHEDULE

Information (hard copy and electronic) will be retained for at least the period specified in the attached retention schedule. When managing records, the School will adhere to the standard retention times listed within that schedule.

Paper records will be regularly monitored by The School Business Manager// Office Manager / Admin Team.

Electronic records will be regularly monitored by The School Business Manager/ Office Manager / Admin Team.

The schedule is a relatively lengthy document listing the many types of records used by the school and the applicable retention periods for each record type. The retention periods are based on business needs and legal requirements with the help of the IRMS Information Management Toolkit for Schools V5 1.2.16.

DESTRUCTION OF RECORDS

Where records have been identified for destruction they should be disposed of in an appropriate way. All information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such as potential litigation, complaints or grievances.

All paper records containing personal information, or sensitive policy information should be shredded before disposal where possible. All other paper records should be disposed of by an appropriate waste paper merchant. All electronic information will be deleted.

ARCHIVING

Where records have been identified as being worthy of preservation over the longer term, arrangements should be made to transfer the records to the archives. A database of the records sent to the archives is maintained by the School Admin team. The appropriate staff member, when archiving documents should record in this list the following information: -

- Date of Birth of child or staff member that records relate to, where appropriate;
- File title/description; and
- Number of files

TRANSFERRING INFORMATION TO OTHER MEDIA

Where lengthy retention periods have been allocated to records, members of staff may wish to consider converting paper records to other media such as digital media or virtual storage centres (such as cloud storage). The lifespan of the media and the ability to migrate data where necessary should always be considered.

RESPONSIBILITY AND MONITORING

The School Business Manager and School Office Manager have primary and day-to-day responsibility for implementing this Policy. The Data Protection Officer, in conjunction with the School is responsible for monitoring its use and effectiveness and dealing with any queries on its interpretation. The data protection officer will consider the suitability and adequacy of this policy and report improvements directly to management.

Internal control systems and procedures will be subject to regular audits to provide assurance that they are effective in creating, maintaining and removing records.

Management at all levels are responsible for ensuring those reporting to them are made aware of and understand this Policy and are given adequate and regular training on it.

Governing Body		
Basic file description	Retention period	Action at end of administrative life
Minutes of governing body meetings / School Advisory Board minutes – Principal Set signed	Principle copy kept permanently. Inspection copy, date of meeting +3 years	Shred copy
Records, reports to Governing Body/ School Advisory Board/Board of Trustees	Permanently if minutes refer directly to report otherwise date of report +6 years	Secure disposal or retain with the signed set of the minutes

Records relating to Complaints	Date of resolution +6 years then review	Secure Disposal
Principal and Senior Leadership Group (SLG)		
Policy and Procedures documents	Life of policy +3 years	Secure Disposal
School Development Plan	Life of SDP +3 years	Secure Disposal
Records created by Principal/Dep Head Teacher/Assist Head/SBM and other internal members of staff with admin responsibilities	Current academic year +6 years then review	Secure Disposal
Reports, records, minutes & correspondence – by SLG and internal administrative bodies	Date of meeting, report, correspondence +3 years	Secure Disposal
Admissions		
All records relating to the creation and implementation of the School Admissions' Policy	Life of the policy +3 years	Secure Disposal
Admissions if successful	Added to student confidential file until DOB +25 years	Secure Disposal
Admissions if unsuccessful	6 months from notification or if appealed, resolution of appeal +1 year	Secure Disposal
Operational Administration		
School prospectus	Current year +3 years	Standard Disposal
Records relating to the creation and distribution of circulars to staff, parents or pupil including Newsletters	Current year +1 year	Standard Disposal
Visitors signing in book and staff signing in sheets	Current year +6 years then review	Secure Disposal
Records relating to the management of data subject access requests and freedom of information requests	Current year +3 years	Secure Disposal
Human Resources		
Job applications and interview records of unsuccessful candidates	Notification +6 months	Secure Disposal
Staff Personnel Records (including, DBS evidence documents, appointment	Personnel files to be kept securely in SBM office. Termination of Employment +6 years	Secure Disposal

details, training, annual appraisals etc.)		
DBS checks	Must not keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	Standard Disposal
Evidence proving the right to work in the UK	Keep on personal file, if separate, after termination of employment + not less than 2 years	Secure Disposal
Maternity pay records	Current year +3 years	Secure Disposal
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Current year +6 years	Secure Disposal
Disciplinary and Grievance Process		
Disciplinary proceedings: case not found	Take advice from Personnel if the proceedings were child protection related otherwise destroy immediately at the conclusion of the case	Secure Disposal
Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned	Secure Disposal
Disciplinary proceedings: oral, written and final warnings	Duration of warning	If warnings are placed on personal files, then they must be weeded from the file
Health and Safety		
H&S Policy	Life of policy +3 years	Secure Disposal
H&S Risk Assessments	Life of RA +3 years	Secure Disposal
All records relating to accident/injury reporting	Adults - date +6 years / Pupil - dob +25 years In the case of serious accidents, a further	Secure Disposal

	retention period may need to be applied.	
All health records relating to COSHH and Asbestos	Current +40 years	Secure Disposal
Fire precaution logs	Current +6 years	Secure Disposal
Maintenance		
All records relating to the maintenance of the school carried out by contractor's school employees including maintenance log books	Current +6 years	Secure Disposal
Records relating to the letting of school premises	Current financial year +6 years	Secure Disposal
Financial Management		
Payroll and wages records	6 years after end of tax year they relate to	Secure Disposal
Records relating to pupils for invoicing purposes	6 years plus current year	Secure Disposal
All banking/invoicing records	6 years plus current year	Secure Disposal
All records relating to the creation and management of budgets including the Annual Budget statement and background papers	Life of budget +3 years	Secure Disposal
Contract monitoring/management	lifetime of the contract	Secure Disposal
ESFA Funding Grants	THE NMSS Related Parties shall maintain original invoices; management information returns and all other documents necessary to verify the Activities provided by itself or by THE NMSS Related Parties in relation to this Funding Agreement for 6 years from the end of the financial year in which the last payment by is made	Secure Disposal
Asset logs	Lifetime of the asset	Secure Disposal
Employers Liability Insurance Certificate	closure of School +40 years	Secure Disposal
Pupil – Safeguarding, Education Records, Curriculum and Extra Curriculum Activities		
Child Protection information held on pupil file	If any records relating to child protection issues are placed on the pupil	Secure Disposal – these records MUST be Shredded

	file, it should be in a sealed envelope and then retained for the same period of time as the pupil file.	
Child protection information held in separate files	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	Secure Disposal – these records MUST be Shredded
Pupil Record relating to teaching & learning, progress, reviews, reports, assessments etc	Pupil DOB +31 years	Secure Disposal
Records relating to pupil EHCP	Pupil DOB +31 years	Secure Disposal
Pupil Premium records	Current year +6 years	Secure Disposal
Attendance Registers	3 years from the date of entry	Secure Disposal
Individual pupil risk assessments	Current academic year +3 years	Secure Disposal
Records relating to school curriculum development, management, implementation, schemes of work, timetable, class record books etc	Current academic year +1	Secure Disposal
Pupils work	Where possible pupils' work should be returned to the pupil at the end of the academic year. If not possible current year + 1 Home School Diaries current year +1	Secure Disposal
Records relating to educational visits outside the classroom	Date of visit + 14 yrs (primary)	Secure Disposal
Parent consent forms for school trips – no major incidents	Conclusion of trip or extra-curricular activity	Secure Disposal
Parent permission slips for school trips – where there has been a major incidents	DOB of pupil +25 yrs (all permission slips of all attendees to be kept to	Secure Disposal

	show rules where followed by all pupils)	
Central Government and Local Authority		
School Census Returns	Current year +5 years	Secure Disposal
Attendance Returns	Current year +1 year	Secure Disposal