



# Greenholm Primary School

## Records Management Policy

### Overarching statement

At Greenholm we are a school that is welcoming, safe and creates an environment which values and supports everyone learning. We work hard to create an ethos that promotes inclusive practice for all, by providing a consistent and fair approach, which is supportive of the continual emotional development of all and by demonstrating mutual respect, openness and honesty.

The 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. It 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.

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 or received, and then stored, in hard copy or electronically.

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.

### **Responsibilities**

The 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 the School.

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.

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.

### **Relationship with existing policies**

This policy has been drawn up within the context of:

- **Freedom of Information Policy**
- **Data Protection Policy**
- **Back up Policy**
- **and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school**

### **– Retention periods of records**

The following are some examples of the period of time for which records must be kept. A more complete list is held in the main school office.

#### **Child Protection**

Child Protection files – 25 years

Allegations of a child protection nature against a staff member – until persons retirement age or 10 years from date of allegation whichever is longer.

#### **Governors**

Reports – 6 years from date of report

Action Plans – from date of plan + 3 years

Policy documents – to expiry of policy

Complaints files – from date of complaint resolution + 6 years

#### **Management**

Reports made by Head teacher or management team – from date of report + 3 years

Admissions (if appeal unsuccessful) – resolution of case + 1 year

Proofs of address supplied by parents as part of the admissions process – current year plus 1 year.

#### **Pupils**

Attendance registers – date of register + 3 years

Examination results (public) – from year of examination + 6 years

Examination results (internal) – current year + 5 years

Statement maintained under The Education Act 1996 – Section 324 – From DOB + 30 years

Parental permission slips for school trips (where there has been no major incident) – to conclusion of trip.

Parental permission slips for school trips (where there has been a major incident) – DOB of the pupil involved + 25 years.

Greenholm Primary  
Greenholm Road  
Great Barr  
Birmingham  
B44 8HS  
0121 464 6321



### **Curriculum**

Class record books – current year + 1 year  
Pupils work – current year + 1 year  
SATS records (exam papers and results) – current year + 6 years

### **Personnel Records**

Timesheets, sick pay – current year + 6 years  
Staff personal files – Termination + 7 years  
Records relating to accident/injury at work – from date of incident + 12 years  
Annual appraisal/assessment records – current year + 5 years

### **Health & Safety**

Incident reports – current year + 20 years  
Risk assessments – current year + 3 years

### **Administration**

Newsletters – current year + 1 year  
Visitors books – current year + 2 years

### **Finance**

Annual accounts – current year + 6 years  
Budget reports, budget monitoring etc – current year + 3 years  
Invoices, receipts etc – current year + 6 years  
Free meals registers – current year + 6 years

### **School Meals**

Dinner register - current year + 3 years

Signed: \_\_\_\_\_ [Head of School]

Dated \_\_\_\_\_