Records Management Policy

The Cottesloe School

Policy Type:	Non - Statutory
Reviewed by:	Mrs N Hulland (Business Manager) and Mrs C Stirk (Safeguarding Governor) Mr S Jones (Headteacher)
Date:	Autumn Term 2026
Approved by:	Resources and People - October 2026
Next review:	(earlier if any legislative change) Autumn Term 2027

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Introduction

The Cottesloe 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.

Our School undertakes to manage records in relation to the three principles laid out in the Lord Chancellor's Code of Practice issued under Section 46 of the Freedom of Information Act 2000, published in July 2021.

This policy provides the framework to achieve effective management and audit of records and is formulated using guidance and the model policy from the Information and Records Management Society Ltd. 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 permanent and temporary 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 hard copy or electronic format**.**

2. Responsibilities

2.1. The governing body of a school has a statutory responsibility to maintain the records and record keeping systems in accordance with the regulatory environment specific to the school. The responsibility is delegated to the Headteacher of the school.

2.2. The person responsible for day-to-day operational management in the school (the Business Manager) 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. Information will be managed 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.

2.5. Information will be assessed and when it is no longer required, it will be destroyed or deleted in line with the retention schedule.

2.6. The security of data and appropriate measures will be implemented to protect breach, loss or unauthorised sharing of the information.

3. Relationship with existing policies

This policy has been drawn up within the context of:

- Freedom of Information Policy
- Data Protection Policy
- Other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

4. Retention schedule

Available on the schools shared drive