



Records Management Policy and Retention Schedule

Last Reviewed Date:	28/07/2025	Reviewed:	25/09/2026
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School Business Manager:		Date:	25/09/2026
Headteacher:		Date:	25/06/2026

Date of Next Review:	September 2027
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1. Background

Amwell View 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.

Section 46 of the Freedom of Information Act 2000, published in July 2021 requires schools, as public authorities, to follow a Code of Practice on managing their records. Under section 7 of the Code of Practice of the Management of Records, it states that:

“Authorities should have in place a records management policy, either as a separate policy or as part of a wider information or knowledge management policy.”

2. Scope of the policy

- 2.1 This policy applies to all records created, received or maintained by permanent staff of the school in the course of carrying out its functions. Also by other professionals, 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 electronic format e.g. paper documents, scanned document, e-mails which document business activities and decisions, audio and video records, text messages, notes of telephone and Skype conversations, spreadsheets, Word documents, presentations etc.

3. Responsibilities

- 3.1 The governing body of a school has a statutory responsibility to maintain the school records and record keeping systems in accordance with the regulatory environment specific to the school. This responsibility is delegated to the Headteacher of the school.
- 3.2 The person responsible for day-to-day operational management in the school will give guidance in 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 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”).
- 3.4 Individual staff and employees must ensure, with respect to records for which they are responsible, that they:



POLICY DOCUMENT

- 3.4.1. Manage the school's records consistently in accordance with the school's policies and procedures;
- 3.4.2. Properly document their actions and decisions;
- 3.4.3. Hold personal information securely;
- 3.4.4. Only share personal information appropriately and do not disclose it to any unauthorised third party;
- 3.4.5. Dispose of records securely in accordance with the school's Records Retention Schedule.
- 3.5 Information will be assessed and when it is no longer required, necessary or is to be destroyed or deleted in line with the retention schedule.
- 3.6 The security of data and appropriate measures will be implemented to protect breach, loss or unauthorised sharing of the information.

4. Relationship with existing policies

This policy has been drawn up with the context of:

- Freedom of Information Policy which can be found on the school shared drive
- Data Protection Policy which can be found on the school website
- Information Governance Policy and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school

5. Creation and Management of School Activities

The Amwell View School secure 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 among many generations; and to serve as a research resource for all interested in the history of Amwell View School and the community it serves.

6. Retention Schedule: IRMS Information Management Toolkit for Schools

Amwell View School uses the Retention Schedule with the IRMS Information Management Toolkit for Schools, which can be found here: https://irms.org.uk/mpage/TK_Schools_RetentionSchedule

Amwell View School is a member of the IRMS. If you need the Username and Password to be able to access the Retention Schedule please email Gill Bebee the g.beebe@amwell.herts.sch.uk or the School Business Manager janet.warrington@amwell.herts.sch.uk who will be able to provide this information.

7. Review

This policy will be reviewed annually.