



Maharishi School

Records Management Policy

(Revised April 2018)

Maharishi 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

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.

1.2 Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for set periods as required) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

1.3 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 would be done in liaison with any requisite bodies as required.

2. Responsibilities

2.1 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 Headteacher, assisted by the Bursar.

2.2 The persons responsible for records management in the school will give guidance for 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. Data Retention Durations

- Pupil and child protection records: Primary pupils' data is held until they leave the school, unless they continue into Maharishi School Secondary phase. Secondary pupils' data is kept until the year in which they reach the age of 25. Transferred pupils, court orders etc are kept at our discretion, within legal parameters.
- Registers are kept until the year in which the class reach the age of 25.
- Staff ID details are held for as long as necessary but for at least 2 years after departure and longer in respect of statutory requirements in respect of payroll/pension data etc.
- Allegations made about staff are kept until the staff member reaches state retirement age or 10 years after the allegation, whichever is longer. Malicious allegations made against staff are removed from the file immediately the case is closed.
- Staff payroll records are required by HMRC to be held for at least 3 years. The school will keep them for 6 years as they may also tie in with accounting records, which must be retained for 6 years.
- Financial records/Accounts are retained for 6 years.
- General First Aid records are retained for as long as considered necessary at the school's discretion, but no longer than is reasonably necessary and no longer than other pupil or staff data. Records of pupil injuries, accident books, RIDDOR records, medical information and medicines administered etc. are retained until pupils reach the age of 25. For adults, data is held for 6 years from the event.
- The Employers' liability insurance certificate is retained for 40 years.

4. Relationship with existing policies

This policy has been drawn up within the context of:

- Freedom of Information policy
- Data Protection/Privacy policy
- And with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.