



**RECORDS LIFE CYCLE POLICY**

**Adopted by Kerr Mackie Primary School Resources Committee  
on 8 May 2018**

**To be reviewed by Governors**

May 2021

**Signed by Chair of Resources Committee**

**Name: Richard McGinn**

**Signature:** 

**Date: 8 May 2018**

## Purpose

The purpose of this policy is to outline the standard to which records should be managed to support this school.

## What you need to do

We will consider the effective management of recorded information (records) through all stages of the lifecycle of information from creation through to disposal.

## Creation

- We will ensure that new records are placed in an organised filing system with consistent naming conventions to allow them to be easily found by those who require access;
- We will use templates or standard formats wherever possible;
- We will ensure all staff adopt and understand a system of version control to ensure that the most up to date version of a record can be identified.
- We will ensure we are able to verify the authenticity of records by having a process in place which tracks changes made.

## Storage, use and Maintenance

- We will ensure the record keeping system will be regularly maintained, with records appropriately stored and protected, whilst allowing accessibility for effective retrieval.
- We will ensure there is adequate storage for records;
- We will have a system to monitor the movement and location of records for easy retrieval;
- We will control access to information;
- We will identify vital records and put appropriate protection in place, including a business recovery plan;
- We will ensure records which are no longer in use but do need to be retained should be stored in a controlled manner in a risk free area;
- We will ensure records which are moved or transferred should be done so in a secure manner and tracked at every stage.

## Retention and Disposal

- We will ensure every record is assigned a retention period based on how long we use the records, statutory requirements or other areas of good practice, and record this on the retention schedule template;
- We will ensure staff refer to and use the schools retention schedule ([IRMS toolkit](#));
- We will ensure where records reach the end of their retention, disposal requirements will be reviewed and we will;
  - o Extend the retention period
  - o Destroy the records
  - o Archive the record
- We will ensure disposal of records are logged for audit purposes;
- Where records are destroyed, they should be done so in a secure manner.