



Tracking, Recording and Reporting Policy

Tracking, Recording and Reporting at Roots and Shoots Learning

Introduction

Roots and Shoots Learning is committed to accurate, consistent tracking, recording, and reporting of children and young people's (CYP) data, progress, attainment, and attendance. We use our internal platform and email systems to ensure team members capture and share information in a timely, transparent, and GDPR-compliant manner. This policy sets out how:

- Team members track CYP progress and attainment via our internal platform
- Attendance is logged and communicated ([see attendance policy](#))
- Termly (and, where appropriate, half-termly or weekly) reports are compiled and distributed to schools, Local Authorities (LA) and parents/carers accordingly

It applies to all Roots and Shoots Learning team members, inclusive of volunteers, and any third-party contractors involved in our data handling.

Roles & Responsibilities

This section defines who does what at Roots and Shoots Learning regarding recording and reporting, ensuring accountability at every step.

Team Members

- Enter progress notes, attainment data, and attendance records promptly into internal platform
- Use agreed templates and channels for consistency
- Flag concerns or significant changes to the Data Coordinator

Managers/Data Coordinators (E.Clarke-Miller & S.Halliday-Chambers)

- Oversee the quality and completeness of all entries in internal platform
- Exports data for reporting and handles distribution schedules
- Ensures compliance with data protection and retention policies

Director, Programme Lead & DSL (Louise Sullivan)

- Provides final sign-off on reporting formats and schedules
- Reviews any data-related incidents and implements corrective actions



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Tracking Methods, Recording & Reporting Procedures

This section describes the platforms and channels we use to capture CYP information.

Internal Platform

We maintain dedicated private channels for each CYP, where team members log:

- Progress notes, with date, activity description, observed outcomes, and next steps
- Attainment data, including any notable achievements, scores (where applicable) or qualitative feedback
- Daily attendance status (present, absent, reason)

Email System

We use email as a secondary record of attendance:

- Daily attendance summaries logged by end of day on the internal platform
- Absence or lateness notifications sent directly to relevant schools' attendance officers

Recording Procedures

This section sets out the standards and timing for capturing data accurately.

| Record Type | Tool | Timing & Detail |
|-----------------------|-----------------------------|---|
| Progress & Attainment | Internal Platform | Immediately after each session; include team member name and timestamp. |
| Attendance | Internal Platform (& Email) | Log start-of-day status in internal platform; email summary by 10 am internally and to schools. |
| Safeguarding Flags | internal platform | Post in the safeguarding channel immediately; follow with a formal report. |

Incomplete or unclear entries are flagged by the Managers/Data Coordinator for prompt correction.

Reporting Procedures

This section outlines how and when we share summaries with external and internal stakeholders.



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| Audience | Frequency | Format | Responsible Party |
|-----------------------|---|--|-------------------|
| Parents/Carers | Termly (minimum) | PDF report via encrypted email | Data Coordinator |
| Referring Schools/LAs | Termly, half-termly, or weekly (agreed) | Standardised email with attached report | Data Coordinator |
| Internal Management | Monthly | Dashboard exports from internal platform | Data Coordinator |

All report templates live on the internal platform “Reporting Templates” channel and are reviewed annually.

Data Review & Quality Assurance

This section details our approach to auditing entries and maintaining high data standards.

- The Data Coordinators/Managers review entries weekly for accuracy and compliance.
- Discrepancies trigger a one-to-one review with the responsible team member.
- Induction and annual refresher training ensures everyone follows best practices.

Data Protection & Privacy

This section reaffirms our commitment to handling all personal data securely and in line with our broader privacy policy.

- Access to CYP channels is restricted to assigned team members and management
- All data exports and reports use encryption and password protection.
- Procedures comply fully with our Data Protection & Privacy Policy, ensuring GDPR alignment.

Record Retention

This section clarifies how long we keep records before secure deletion or anonymisation.

- Tracking data and reports follow the retention schedules in our Data Protection & Privacy Policy.
- After retention periods elapse, internal platform channels are archived; exports are deleted or irreversibly anonymised.

Monitoring & Review



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This section explains how we keep the policy up to date and effective.

- Reviewed annually by Louise Sullivan and the Management team/Data Coordinators, or sooner if legislation or practice changes.
- Policy updates are communicated to all team members and reflected in revised internal platform templates.

Feel free to reach out with any queries or feedback about this policy.

Author Details

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