



RECORDS MANAGEMENT POLICY

Approval Date	Pending ratification by Risk and Audit Committee (November 2025)
Policy Owner	Director of Operations
Adopted by Trust Board	Pending ratification by Trust Board (November 2025)
Review Date	November 2027

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1. INTRODUCTION

- 1.1 The Trust 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.
- 1.2 Records provide evidence for protecting the legal rights and interests of the Trust 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

2. SCOPE OF THE POLICY

- 2.1 This policy applies to all records created, received or maintained by staff of the academy in the course of carrying out its functions.
- 2.2 Records are defined as all those documents which facilitate the business carried out by the academy 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 electronically.
- 2.3 A small percentage of the academy's records will be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the County Archives Service.

3. RESPONSIBILITIES

- 3.1 The Trust 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 Head of the Academy.
- 3.2 The School Data Protection Leads are responsible for records management in each academy and 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. The School Data Protection Leads 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 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 academy's records management guidelines. The school follows the SchoolPro Records Management Schedule V.1, which is available on request.

4. RELATIONSHIP WITH EXISTING POLICIES

- 4.1 This policy has been drawn up within the context of the Trust Freedom of Information Policy, Data Protection Policy and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the Trust.

5. REVIEW

5.1 This policy is reviewed as required by the Trust every two years, or earlier if necessary.

POLICY HISTORY

Date	Summary of change	Contact	Policy Implementation Date	Review Date
September 2022	New policy implemented	Operations	October 2022	September 2024
October 2024	Review of policy	Operations	October 2024	October 2025
October 2025	Section 3.3: Replace IRMS toolkit with Records Management Schedule V1. Removed Appendix 1: IRMS toolkit.	Operations	November 2025	November 2027