

# Policies & Procedures

# Records Management Policy

<b>Date policy approved</b>	Spring 2018
<b>Approving body</b>	Abbey MAT Board of Directors
<b>Next review date</b>	Spring 2021
<b>Previous review date</b>	

# Abbey Multi Academy Trust

## Records Management Policy Statement

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.

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

### **Scope of the policy**

This policy applies to all records created, received or maintained by staff of the Trust and its academies in the course of carrying out the Trust's functions.

Records are defined as all those documents which facilitate the business carried out by the Trust 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.

A small percentage of the Trust's records will be selected for permanent preservation as part of the Trust's archives and for historical research.

### **Responsibilities**

The Trust has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with day-to-day responsibility for this policy in each of the Trust's academies is the relevant Principal/ Head of School.

The person responsible for records management in the academy will, with the support of the Data Protection Officer (DPO), 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.

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 Trust's Retention Schedule and guidance issued by the Trust from time to time.

## Relationship with existing policies

This policy is linked with the following policies and documents:

- Abbey MAT Data Protection policy
- Abbey MAT Retention Schedule
- Abbey MAT Privacy Notices
- Abbey MAT Freedom of Information policy and publication scheme
- Abbey MAT Data Protection Handbook (guidance issued to staff)

Review frequency: 3+ years

Policy owner: Governance & Compliance Officer (DPO)