



# Saint Robert Lawrence Catholic Academy Trust

## Records Management Policy Statement

**Date approved:** January 2017

**Date reviewed:**

**Date for next review:** January 2020

The term Academy Trust is taken to mean Saint Robert Lawrence Catholic Academy Trust and each academy which is part of the Trust. The Academy 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 Trust. Records provide evidence for protecting the legal rights and interests of the Academy 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

### **1. Scope of the policy**

- 1.1 This policy applies to all records created, received or maintained by staff at the Academy Trust in the course of carrying out their functions.
- 1.2 Records are defined as all those documents which facilitate the business carried out by the Academy 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.
- 1.3 A small percentage of the records may be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the relevant County Archives Service.

### **2. Responsibilities**

- 2.1 The Academy 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 Accounting Officer.

2.2 The Company Secretary is responsible for records management and will give guidance for good records management practice and will promote compliance with this policy in line with Information and Records Management Society (IRMS) guidelines so that information will be retrieved easily, appropriately and in a timely way. A model Retention Schedule will be used across the Trust to ensure that records are retained as appropriate. 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 records management guidelines.

### **3. Relationship with existing policies**

This policy has been drawn up within the context of:

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