Records Management Policy

This policy has been approved by Directors and the Operations Board

Policy written	**June 2020**
Policy reviewed	**June 2020**
Date of next review	**June 2022**
Policy owner	**Data Protection**

Contents

Mission Statement

"To prepare our young pupils to be the adults that they are to become, by encouraging them to reach their full potential academically through high quality teaching of a curriculum including life skills.

Additionally, to introduce all pupils to a wide range of potential careers and mentors from the business world both locally and regionally so that they are fully prepared for the world of work when that time arrives."

Values and Principles

The values of respect, manners, listening, motivation, perseverance, cooperation, excellence, independence, enjoyment and organization are central to everything we do at the Skills for Life Trust. The principles of teamwork, support, consistency and high standards underpin these values.

Purpose

The Skills for Life 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

1. Scope of the policy

This policy applies to all records created, received or maintained by permanent and temporary staff of the Trust in the course of carrying out its functions. Also, by any agents, contractors, consultants or third parties acting on behalf of the Trust.

Records are defined as all 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 electronic format, e.g., paper documents, scanned documents, e-mails which document business activities and decisions, audio and video recordings, text messages, notes of telephone conversations and virtual meetings, spreadsheets, MS Word documents, and presentations.

2. Responsibilities

The governing body of the Trust has a statutory responsibility to maintain the records and recordkeeping systems in accordance with the regulatory environment specific to the Trust. This responsibility is usually delegated to the CEO and the Head Teacher of each academy.

The person responsible for day-to-day operational management of each Trust central service and each of the trust academies will give guidance on good records management practice and will promote compliance with this policy, so that information can 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. The Trust Data Protection Officer will support this process.

The Trust will manage and document its records disposal process in line with the Records Retention Schedule. This will help to ensure that it can meet Freedom of Information requests and respond to requests to access personal data under data protection legislation (subject access requests, SARs).

Individual staff and employees must ensure, with respect to records for which they are responsible, that they:

- Manage records consistently, in accordance with the Trust's policies and procedures
- Properly document their actions and decisions
- Hold personal information securely
- Only share personal information appropriately and do not disclose it to any unauthorised third party
- Dispose of records securely, in accordance with the Trust's Records Retention Schedule

3. Relationship with existing policies

This policy has been drawn up within the context of:

- Records Retention schedule
- Data Protection policy
- Data Security policy
- Freedom of Information policy
- Any other legislation or regulations (including audit, equal opportunities and ethics) affecting the Trust