



Records Management Policy

Records Management Policy

Audience:	School and academy staff
Reviewed: Approved: Effective From:	May 2026 – Trust Data Manager 18 May 2026 - Board 19 May 2026
Other Related Policies / Procedures:	Freedom of Information Policy Data Protection Policy
Policy Owner:	Trust Data Manager
Policy / Procedure Model:	Trust policy: all Crofty schools use this policy
Date of Next Review:	February 2029
Version Number:	2026-29 V1

1 Introduction

1.1 Crofty Education 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 academy 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:

- 1.1.1 Scope
- 1.1.2 Responsibilities
- 1.1.3 Relationships with existing policies

2 Scope

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 Crofty Education 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 Chief Executive Officer.

3.2 The Trust Data Manager is responsible for records management in the academy, 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 Trust Data Manager 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 attached as a separate document or available on request.

4 Relationship with Existing Policies

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

Signed: _____ [Trust CEO]