



<b>Title of Policy/Procedure</b>	BKAT Records Management
<b>Reviewer(s):</b>	SchoolPro TLC Head of Governance Chief Operations Officer
<b>To be read in conjunction with the following policies:</b>	BKAT Data Protection Policy BKAT Freedom of Information Policy Records Management Society (IRMS) Record Retention Schedule
<b>Consultation Process</b>	N/a
<b>Policy Date:</b>	March 2023
<b>Review Date:</b>	March 2026
<b>This policy has been ratified by:</b>	Risk, Audit, Health and Safety and Premises Committee

## Contents

1. Introduction .....	2
2. Scope .....	2
3. Responsibilities .....	2
4. Relationship with Existing Policies .....	3
Appendix A: Information Management Toolkit for Academies (2019) .....	4

## 1. Introduction

The Blue Kite 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 institution. Records provide evidence for protecting the legal rights and interests of the Trust and its schools, 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

This policy applies to all records created, received or maintained by staff of the trust in the course of carrying out its functions.

Records are defined as all those documents which facilitate the business carried out by the trust and the schools 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 and school's records will be selected for permanent preservation as part of the institution's archives and for historical research.

## 3. Responsibilities

The Blue Kite 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 on a day to day basis is the Headteacher.

The Headteacher is responsible for records management in the school, 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 headteacher 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 school's records management guidelines. The school follows the Information and Records Management Society (IRMS) record retention schedule found in the <https://irms.org.uk/page/AcademiesToolkit>

#### **4. Relationship with Existing Policies**

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

## Appendix A: Information Management Toolkit for Academies (2019)

From page 63 onwards.

### Document Version Control Log

Version	Date	Description of changes and person/organisation responsible
1.0	25/11/2020	Document created (updated from original Schools' policy) and uploaded to portal (SchoolPro TLC)