



The  
Boleyn  
Trust

# Information Management Policy

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## 1. POLICY STATUS AND REVIEW

Policy Owner:	Chief Finance and Operating Officer
Policy Author:	Chief Finance and Operating Officer
Approver:	Board of Trustees
Last Review:	October 2022
New Review:	September 2023
Ratified:	26 September 2022

The Board of Trustees has agreed to this Policy and, as such, it applies to all Boleyn Trust entities. Please note that should any further national guidance be issued by external agencies that are relevant to this policy, it will be updated accordingly prior to the review date shown below and re-circulated.

**Please Note:**

**Boleyn Trust CEO and Accounting Officer:** Tom Canning CBE  
**Boleyn Trust Chief Finance and Operating Officer:** Steven Lock

.....  
**Chair of the Board of Trustees**

## 2. RATIONALE

The Academies within the Trust hold a great deal of information, much of which is confidential. This may be information about:

our students;  
our students' parents, or guardians;  
our teachers and other staff;  
our governors.

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

## 3. POLICY STATEMENT

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

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

### **Responsibilities**

Each School 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 Headteacher.

The person 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. 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 School's records management guidelines.

Relationship with existing policies

The Retention Schedule (Annex 3) is in operation. This lays down the length of time a record needs to be retained, after which it will be destroyed. Time scales are based on DfE guidelines.

## **4. APPENDICES**

Scheduled of Records Transferred. Please ask CFOO for latest version.

Pro-forma of individual records to be converted to electronic media. Please ask CFOO for latest version.

Information Retention Schedule. Please ask CFOO for latest version.