



United Learning Trust
The best in everyone™

Registered Charity Number: 1093277
Company Number: 4439859

Records Management and Retention Policy

The United Learning Trust (ULT) recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

Scope
Responsibilities
Relationships with existing policies

Scope of the policy

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

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

Responsibilities

The 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 Principal of an ULT Academy.

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 timely.

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

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 school.