Grove Learning Trust

Creating Remarkable Futures

Records Management Policy (Document Retention)

Owner: Grove Learning Trust
Author: Sarah Rutherford – Governance & Compliance Lead – SchoolPro model template used

Working party: Not applicable

Approved by: Chief Executive Officer (Interim)
Date approved: Dec 2025
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Version Control

Version	Date	Status	Author (AU) / Approver (AP)
Draft 01	Sept 2024	First draft (SchoolPro model)	SR (AU)
Final – A	Autumn 2024	Trustees (RAR) to approve	RAR (AP)
Final - B	Autumn 2025	Policy moved onto central model template New legislation – link added to Data (Use and Access) Act 2025 Reference to IRMS toolkit changed to SchoolPro Records Management Schedule V.1 (appendix A)	SR (AU)

Vision & Values

As one organisation, our vision for Grove Learning Trust is unapologetically bold. We are all about **creating remarkable futures.** For our children, our people, our places of work, we want the very best. We know that strong connections will enable us to achieve our vision, in a world where purposeful collaboration, based on mutual respect and trust, helps us to achieve more together.

Trust >> Connect >> Collaborate

Our policies underpin our vision and set out clearly our expectations of each other.

About this policy

Grove Learning 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:

This policy applies to all records created, received or maintained by staff of GLT 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 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 trusts' 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.

Responsibilities

Grove Learning 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 **CEO.**

The **Strategic Operations Lead** is responsible for records management in the trust, 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 **Governance & Compliance Lead** 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 trust'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.

Related 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.

Relevant legislation

Data (Use and Access) Act 2025

Appendix A – SchoolPro Records Management Schedule V.1



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