

Section 1: Management of the School		
File Description	Retention Period	Action at the end of the Retention Period
1.1: Governance		
Agendas for Governing Body meetings	One copy retained with master set of minutes	Secure disposal
Minutes - Principal Set - (Signed) - Inspection copies	Permanent Date of the meeting plus 6 years.	N/A Secure disposal
Instruments of Government include Articles of Association	Permanent	N/A
Meeting papers related to annual parents' meeting held under section 33 of the education act 2002	Date of the meeting plus 6 years.	Secure disposal
Trusts and endowments managed by the Governing Body	Permanent	N/A
Policy documents	Life of the policy plus 3 years	Secure disposal
Records of complaints	Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	Secure disposal
Annual reports	Date of report plus 10 years	Secure disposal
Proposals concerning the change of status of the school	Date proposal accepted or declined + 3 years	Secure disposal
1.2: Headteacher and Senior Management Team		
Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	6 academic years then review	Secure disposal
Reports created by the Head Teacher or the Management Team	6 academic years then review review	Secure disposal
Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	6 academic years then review	Secure disposal

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Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	6 academic years then review	Secure disposal
Professional Development Plans	6 academic years then review	Secure disposal
School Development Plans	6 academic years then review	Secure disposal
1.3: Admissions		
All records relating to the creation and implementation of the School Admissions' Policy	Life of the policy + 3 years then review	Secure disposal
Admissions – if the admission is successful	Date of admission + 1 year	Secure disposal
Admissions – if the appeal is unsuccessful	Resolution of case + 1 year	Secure disposal
Register of Admissions	Permanent	N/A
Proofs of address supplied by parents as part of the admissions process	Current year + 1 year	Secure disposal
Supplementary Information including additional information such as religion, medical conditions. - For successful admissions - For unsuccessful admissions	This information should be added to the pupil file Until appeals process completed	Secure disposal
1.4: Operational Administration		
General file series	6 academic years then review	Secure disposal
Records relating to the creation and publication of the school brochure or prospectus	Current year + 3 years	Standard disposal
Records relating to the creation and distribution of circulars to staff, parents or pupils	Current year + 1 year	Standard disposal
Newsletters and other items with a short operational use	Current year + 1 year	Standard disposal
Visitors' Books and Signing in Sheets	6 academic years then review	Secure disposal
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations		Secure disposal

Section 2: Human Resources		
File Description	Retention Period	Action at the end of the Retention Period
2.1: Recruitment		
All records leading up to the appointment of a new headteacher	Date of appointment + 6 years	Secure disposal
All records leading up to the appointment of a new member of staff – unsuccessful candidates	Date of appointment of successful candidate + 6 months	Secure disposal
All records leading up to the appointment of a new member of staff – successful candidate	All the relevant information should be added to the staff personal file (see below) and all other information retained for 6 months	Secure disposal
Pre-employment vetting information – DBS Checks	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months	Secure disposal
Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	These should be checked and a note kept of what was seen and what has been checked. If it is felt necessary to keep copy documentation then this should be placed on the member of staff’s personal file	Secure disposal
Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	These documents should be added to the Staff Personal File [see below], but if they are kept separately then the Home Office requires that the documents are kept for termination of Employment plus not less than two years	Secure disposal
2.2: Operational Staff Management		
Staff Personal File	Termination of Employment + 6 years	Secure disposal
Timesheets	6 academic years	Secure disposal
Annual appraisal/ assessment records	6 academic years	Secure disposal
2.3: Disciplinary and Grievance Processes		
Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is the longer then REVIEW. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned	SECURE DISPOSAL These records must be shredded
Disciplinary Proceedings		

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<ul style="list-style-type: none"> - Verbal warning - Written warning - Case not found 	<p>Date of warning plus 6 months</p> <p>Date of warning plus 12 months</p> <p>If the incident is child protection related then see above otherwise dispose of at the conclusion of the case</p>	<p>Secure disposal</p> <p>Secure disposal</p> <p>Secure disposal</p>
2.4: Health & Safety		
Health and Safety Policy Statements	Life of policy + 3 years	Secure disposal
Health and Safety Risk Assessments	Life of risk assessment + 3 years	Secure disposal
Records relating to accident/injury at work	Date of incident + 12 years In the case of serious accidents a further retention period will need to be applied	Secure disposal
<p>Accident Reporting</p> <ul style="list-style-type: none"> - Adults - Children 	<p>Date of the incident + 6 years</p> <p>DOB of the child + 25 years</p>	<p>Secure disposal</p> <p>Secure disposal</p>
Control of Substances Hazardous to Health (COSHH)	Current year + 40 years	Secure disposal
Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	Last action + 40 years	Secure disposal
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	Last action + 50 years	Secure disposal
Fire Precautions log books	Current year + 6 years	Secure disposal
2.5: Payroll and Pensions		
Maternity pay records	Current year + 3 years	Secure disposal
Records held under Retirement Benefits Schemes (Information Powers) Regulations 199	Current year + 6 years	Secure disposal

Section 3: Financial Management of the School		
File Description	Retention Period	Action at the end of the Retention Period
3.1: Risk Management and Insurance		
Employer's Liability Insurance Certificate	Closure of the school + 40 years	Secure disposal
3.2: Asset Management		
Inventories of furniture and equipment	Current year + 6 years	Secure disposal
Burglary, theft and vandalism report forms	Current year + 6 years	Secure disposal
3.3: Accounts and Budgets		
Annual Accounts	Current year + 6 years	Standard Disposal
Loans and grants managed by the school	Date of last payment on the loan + 12 years then review	Secure disposal
Student Grant applications	Current year + 3 years	Secure disposal
All records relating to the creation and management of budgets including the Annual Budget statement and background papers	Life of the budget + 3 years	Secure disposal
Invoices, receipts, order books and requisitions, delivery notices	Current financial year + 6 years	Secure disposal
Records relating to the collection and banking of monies	Current financial year + 6 years	Secure disposal
Records relating to the identification and collection of debt	Current financial year + 6 years	Secure disposal
3.4: Contract Management		
All records relating to the management of contracts under seal	Last payment on the contract + 12 years	Secure disposal
All records relating to the management of contracts under signature	Last payment on the contract + 6 years	Secure disposal
Records relating to the monitoring of contracts	Current year + 2 years	Secure disposal
3.5: School Fund		
School Fund - Cheque books	Current year + 6 years	Secure disposal
School Fund - Paying in books	Current year + 6 years	Secure disposal
School Fund – Ledger	Current year + 6 years	Secure disposal
School Fund – Invoices	Current year + 6 years	Secure disposal
School Fund – Receipts	Current year + 6 years	Secure disposal

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School Fund - Bank statements	Current year + 6 years	Secure disposal
School Fund – Journey Books	Current year + 6 years	Secure disposal
3.6: School Meal Management		
Free School Meals Registers	Current year + 6 years	Secure disposal
School Meals Registers	Current year + 3 years	Secure disposal
School Meals Summary Sheets	Current year + 3 years	Secure disposal

Section 4: Property Management		
File Description	Retention Period	Action at the end of the Retention Period
4.1: Property Management		
Title deeds of properties belonging to the school	PERMANENT These should follow the property unless the property has been registered with the Land Registry	N/A
Plans of property belong to the school	These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold.	N/A
Leases of property leased by or to the school	Expiry of lease + 6 years	Secure disposal
Records relating to the letting of school premises	Current financial year + 6 years	Secure disposal
4.2: Maintenance		
All records relating to the maintenance of the school carried out by contractors	Current year + 6 years	Secure disposal
All records relating to the maintenance of the school carried out by school employees including maintenance log books	Current year + 6 years	Secure disposal

Section 5: Pupil Management		
File Description	Retention Period	Action at the end of the Retention Period
5.1: Pupil's Educational Records		
Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005 - Primary - Secondary	Retain whilst the child remains at the primary school Date of Birth of the pupil + 25 years	The file should follow the pupil when he/she leaves the primary school. This will include: <ul style="list-style-type: none"> • to another primary school • to a secondary school • to a pupil referral unit Secure disposal
Examination Results – Pupil Copies - Public - Internal	This information should be added to the pupil file This information should be added to the pupil file	All uncollected certificates should be returned to the examination board.
Child Protection information held on pupil file	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file.	SECURE DISPOSAL – these records MUST be shredded
Child protection information held in separate files	DOB of the child + 25 years then review This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record	SECURE DISPOSAL – these records MUST be shredded
5.2: Attendance		
Attendance Registers	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made	Secure disposal

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Correspondence relating to authorised absence	Current academic year + 2 years	Secure disposal
5.3: Special Educational Needs		
Special Educational Needs files, reviews and Individual Education Plans	Date of Birth of the pupil + 25 years	REVIEW NOTE: This retention period is the minimum retention period that any pupil file should be kept. Some authorities choose to keep SEN files for a longer period of time to defend themselves in a “failure to provide a sufficient education” case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented
Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement.	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
Advice and information provided to parents regarding educational needs	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold
Accessibility Strategy	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL unless the document is subject to a legal hold

Section 6: Curriculum Management		
File Description	Retention Period	Action at the end of the Retention Period
6.1: Statistics and Management Information		
Curriculum returns	Current year + 3 years	Secure disposal
Examination Results (Schools Copy)	Current year + 6 years	Secure disposal
Published Admission Number (PAN) Reports	Current year + 6 years	Secure disposal
Value Added and Contextual Data	Current year + 6 years	Secure disposal
Self Evaluation Forms	Current year + 6 years	Secure disposal
6.2: Implementation of Curriculum		
Schemes of Work	Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Timetable	Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Class Record Books	Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Mark Books	Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Record of homework set	Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period or SECURE DISPOSAL
Pupils' Work	Where possible pupils' work should be returned to the pupil at the end of the academic year if this is not the school's policy then current year + 1 year	Secure disposal

Section 7: Extra Curricular Activities		
File Description	Retention Period	Action at the end of the Retention Period
7.1: Educational Visits		
Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools	Date of visit + 14 years	Secure disposal
Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Secondary Schools	Date of visit + 10 years	Secure disposal
Parental consent forms for school trips where there has been no major incident	Conclusion of the trip	Secure disposal
Parental permission slips for school trips – where there has been a major incident	DOB of the pupil involved in the incident + 25 years The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	Secure disposal
7.2: Walking Bus		
Walking Bus Registers	Date of register + 3 years This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept for the period of time required for accident reporting	SECURE DISPOSAL [If these records are retained electronically any back up copies should be destroyed at the same time]
7.3: Family Liaison		
Day Books	Current year + 2 years then review	Secure disposal
Reports for outside agencies - where the report has been included on the case file created by the outside agency	Whilst child is attending school and then destroy	
Referral forms	While the referral is current	
Contact data sheets	Current year then review, if contact is no longer active then destroy	
Group Registers	Current year + 2 years	

Section 8: Central and Local Government		
File Description	Retention Period	Action at the end of the Retention Period
8.1: Local Authority		
Secondary Transfer Sheets (Primary)	Current year + 2 years	Secure disposal
Attendance Returns	Current year + 1 year	Secure disposal
School Census Returns	Current year + 5 years	Secure disposal
Circulars and other information sent from the Local Authority	Operational use	Secure disposal
8.2: Central Government		
OFSTED reports and papers	Life of the report then REVIEW	Secure disposal
Returns made to central government	Current year + 6 years	Secure disposal
Circulars and other information sent from central Government	Operational use	Secure disposal

Action	Committee	Date
Review and Approve	Resources Committee	5 th May 2022
Next Review	Resources Committee	May 2025