

St Luke's C of E Primary School

St. Luke's Data Retention Policy

Approved by Governors: November 2026

To be reviewed: November 2029

Contents

School Records Management Policy 4
Scope of the policy 4
Responsibilities 4
Relationship with existing policies 4
Safe Disposal of Records 4
School Closures 5
What to do with records once they have reached the end of their administrative life 5
Destruction of records 5
Transfer of records to the Archives 5
Transfer of information to other media 5
Data Retention Schedule 6
Management of the School 6
Governors 6
Head Teacher and Senior Management Team 9
Admissions Process 22
Operational Administration 10
Human Resources 11
Recruitment 11
Operational Staff Management 13
Management of Disciplinary and Grievance Processes 14
Health and Safety 15
Payroll and Pensions 16
Financial Management of the School 18
Risk Management and Insurance 18
Asset Management 19
Accounts and Statements including Budget Management 19
Property Management 21
Pupil Management 22
Curriculum Management 27
Extra Curricular Activities 28
Central Government and Local Authority 31
Local Authority 31
Central Government 31

School Records Management Policy

St. Luke's 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 school. Records provide evidence for protecting the legal rights and interests of the school, and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited.

Scope of the policy

This policy applies to all records created, received or maintained by staff of the 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 institution's archives and for historical research. This should be done in liaison with the County Archives Service.

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 Head of the School.

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

This policy has been drawn up within the context of:

- Freedom of Information policy
- Data Protection policy
- Data Privacy Notices
- and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

Safe Disposal of Records

Where records have been identified for destruction they should be disposed of in an appropriate way. All records containing personal information, or sensitive policy information, should be shredded before disposal using a crosscut shredder. Any other records should be bundled up and disposed of to a wastepaper merchant or disposed of in other appropriate ways. Do not put records in the dustbin or a skip.

There are companies who can provide confidential waste bins and other services which can be purchased to ensure that records are disposed of in an appropriate way.

The Freedom of Information Act 2000 requires the school to maintain a list of records which have been destroyed and who authorised their destruction.

Members of staff should record at least:

- File reference (or other unique identifier).
- File title (or brief description) and number of files.

- The name of the authorising officer and the date action taken.

This should be kept in an Excel spreadsheet or similar suitable format and can be found ***in a secure area of St. Luke's servers.***

School Closures

It is the responsibility of each Local Authority [LA] to manage the records of closed schools until they have reached the end of their administrative life and to arrange for their disposal when required.

There may be a number of different reasons why schools close which may affect where school records need to be stored.

- If the ***St. Luke's*** has been closed and the site is being sold or reallocated to another use, then the LA should take responsibility for the records from the date the school closes.
- If two schools have merged and function as one school, it will be necessary for the new school to retain any records originating from the two schools for the appropriate time.
- If ***St. Luke's*** closes and subsequently becomes an Academy, the records relating to the pupils who are transferring to the Academy will be transferred. If the Academy is retaining the current buildings, then all records relating to the maintenance of the buildings should also be transferred. All other records become the responsibility of the Local Authority.

The purpose of the retention guidelines

The retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use. The retention schedule lays down the basis for normal processing under the Data Protection Act 2018 the Freedom of Information Act 2000 and the General Data Protection Regulation 2016
The retention periods are informed by other legislation such as Education Act 1995, Limitation Act 1990, the Information management toolkit for schools has been consulted for posterity.
Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems.

The retention schedule refers to record series regardless of the media in which they are stored.

What to do with records once they have reached the end of their administrative life.

Destruction of records

Where records have been identified for destruction they should be disposed of in an appropriate way. All records containing personal information, or confidential policy information should be shredded before disposal.

Transfer of records to the Archives

Where records have been identified as being worthy of permanent preservation, arrangements should be made to transfer the records to the Archives.

Transfer of information to other media

Where lengthy retention periods have been allocated to records, members of staff may wish to consider converting paper records to other media such as digital media. The lifespan of the media and the ability to migrate data where necessary should always be considered

Management of the School

This section contains retention periods connected to the general management of the school. This covers the work of the Governing Body, the Headteacher and the senior management team, the admissions process and operational administration.

Governors

Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record	
Agendas for Governing Body Meetings-Principal Copy	No		Where possible the agenda should be stored with the principal set of the minutes.	Secure Disposal	
Records relating to DBS checks carried out on clerk and the members of the governing body	Yes		Date of DBS check + 6 years	Secure Disposal	
Governor Personnel Files	Yes		Date appointment ceases + 6 years	Secure Disposal	
Records relating to the induction program for new governors	No		Date appointment ceases + 6 years	Secure Disposal	
Records relating to the training required and received by Governors	Yes		Date appointment ceases + 6 years	Secure Disposal	
Records Relating to the appointment of a clerk to the governing body	Yes		Date appointment ceases + 6 years	Secure Disposal	
Records relating to the terms of office serving governors, including evidence of appointment	Yes		Date appointment ceases + 6 years	Secure Disposal	
Records Relating to Governor declaration of Disqualification criteria	Yes		Date appointment ceases + 6 years	Secure Disposal	
Register of Business Interests	Yes		Date appointment ceases + 6 years	Secure Disposal	
Records relating to the Election of parent and Staff governors not appointed by the governors	Yes		Date of election + 6 months	Secure Disposal	

Records relating to the appointment of co-opted Governors	Yes		Provided the decision relating to the appointment has been recorded in the minutes then the records can be destroyed when the co-opted Governor finishes their term. (unless where there has been allegations concerning children then retain for 25 years.	Secure Disposal	
Governor Code of Conduct	No		A copy of each version of this document should be kept.		
Records relating to the election of a chair or vice chair	Yes		Once the decision has been recorded in the minutes the records can be destroyed.	Secure Disposal	
Scheme of delegation and terms of reference for committees.	No		Until superseded or whilst relevant.	These could be offered to the archives if appropriate.	
Meetings Schedule	No		Current Year		
Record of attendance at full governing Board Meetings	Yes		Date of Meeting + 6 years	Secure Disposal	
Papers relating to the management of the annual parents meting	Yes		Date of Meeting + 6 years	Secure Disposal	
Records Relating to Governor Monitoring Visits	Yes		Date of Visit + 5 Years	Secure Disposal	
Annual Reports required by the DoE	Yes		Date of Report + 10 Years	Secure Disposal	
All Records relating to the conversion of schools to Academy Status	Yes		For the life of the organisation.	Consult the local archives before destruction	
Correspondence sent and received by the governing body or head teacher	Yes		Current year + 3 years	Secure Disposal	
Minutes of Governing Body meetings- Principle Set (signed)	Yes		Although generally kept for the life of the organisation the LA is only required to make this available for 10	Consult the LA before destruction.	Transfer to Archives when the school has closed

			years from the Date of meeting.		
Reports presented to the Governing Body which are referred to in the minutes.	No		Although generally kept for the life of the organisation the LA is only required to make this available for 10 years from the Date of meeting.		Transfer to Archives
Instruments of Government including Articles of Association	No		For the life of the school	Retain in school	Transfer to Archives when the school has closed
Trusts and Endowments managed by the Governing Body	No		For the life of the school	Retain in school whilst operationally required	Transfer to Archives when the school has closed
Action plans created and administered by the Governing Body	No		Until superseded or whilst relevant	Secure Disposal	It may be appropriate to offer to the Archives
Policy documents created and administered by the Governing Body	No		Until superseded	Retain in school whilst policy is operational	Transfer to Archives
Records relating to complaints dealt with by the Governing Body	Yes		Major Complaints Date of resolution of complaint + 6 years Complaints involving allegations of Negligence Date of resolution of complaint + 15 years Complaints involving allegations relating to safeguarding or child protection Date of resolution of complaint + 40 years	Retain in school for the first six years Review for further retention in the case of contentious disputes Secure Disposal routine complaints	
Annual Reports required by the Department for Education and Skills	No	Education (Governors' Annual Reports)	Date of report + 10 years		Transfer to Archives

		(England) (Amendment) Regulations 2002.SI 2002 No 1171			
Proposals for schools to become, or be established as Specialist Status schools	No		Current year + 3 years		Transfer to Archives

Head Teacher and Senior Management Team

Basic file description	Data Protection Issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record	
Logbooks of activity in the school maintained by the Head Teacher	Yes		Date of last entry in the book + a minimum of 6 years then reviews.		These could be of permanent historical value and should be offered to the County Archives Service if appropriate
Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	Yes		Date of the meeting + 3 years then review.	Secure Disposal	These could be of permanent historical value and should be offered to the County Archives Service if appropriate
Reports created by the Head Teacher or the Management Team	Yes		Date of the report + a minimum of 3 years then reviews.	Secure Disposal	These could be of permanent historical value and should be offered to the County Archives Service if appropriate
Records created by head teachers, deputy head teachers, heads of year and other members of staff	Yes		Current academic year + 6 years then review	Secure Disposal	

with administrative responsibilities					
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	Yes		Date of correspondence + 3 years then review	Secure Disposal	
Professional Development Plans	Yes		These should be held on the individual's personnel records. If not then termination of employment + 6 years	Secure Disposal	
School Development Plans	No		Life of the plan + 3 years	Secure Disposal	

Operational Administration

Basic file description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative
General file series	No		Current year + 5 years then REVIEW	Secure Disposal
Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	Standard Disposal
School Privacy Notice which is sent to Parents and Pupils	No	Data Protection Act 2018, General Data Protection Regulation	Until superseded + 6 years	Standard Disposal
Consent obtained in order to process personal data e.g., use of image, mailing lists	Yes	Data Protection Act 2018, General Data Protection Regulation	Until the indivdual is no longer associated with the school	Secure Disposal
Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current academic year + 1 year	Standard Disposal
Newsletters and other items with a short operational use	No		Current academic year + 1 year	Standard Disposal
Visitors' Signing in Information: Paper and Electronic Versions	Yes		Current year + 6 years then REVIEW	Secure Disposal

Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years then REVIEW	Secure Disposal

Policies, Frameworks and Overarching Requirements:				
Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period**	**Action at the end of the administrative life of the record**
Data Protection Policy, including data protection notification	No		Date policy superseded + 6 years	SECURE DISPOSAL
Freedom of Information Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Information Security Breach Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Special Educational Needs Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Complaints Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Risk and Control Framework	No		Life of framework + 6 years	SECURE DISPOSAL
Rules and Bylaws	No		Date rules or bylaws superseded + 6 years	SECURE DISPOSAL
Home School Agreements	No		Date agreement revised + 6 years	SECURE DISPOSAL
Equality Information and Objectives (public sector equality duty) Statement for publication	No		Date of statement + 6 years	SECURE DISPOSAL

Human Resources

This section deals with all matters of Human Resources management within the school.

Recruitment				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**

All records leading up to the appointment of a new headteacher	Yes		• For unsuccessful candidates Date of Appointment plus 6 months • For successful candidates date of appointment + 6 years, except in the cases of negligence or claims of child abuse then 15 years minimum	Secure Disposal
All records leading up to the appointment of a new member of staff – unsuccessful candidates	Yes		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	Yes		Application forms, references and other documents for the duration of employment + 6 years.	Secure Disposal
Pre-employment vetting information – DBS Checks- successful candidates	No	DBS Update Service Employer Guide June 2014: Keeping children safe in education. Sep 2022 (Statutory Guidance from Dept. of Education) Sections 73, 74	Application forms and references and other documents for the duration of the employee's employment + 6 years	
Proofs of identity collected as part of the process of checking "portable" enhanced DBS disclosure	Yes		Where possible 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	
Pre-employment vetting information – Evidence	Yes	An employer's guide to right to work checks [Home Office May 2015]	Where possible these documents should be added to the Staff Personal File [see	

proving the right to work in the United Kingdom[4]			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 2 years	

Operational Staff Management				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Staff Personal File	Yes	Limitation Act 1980 (Section 2)	Termination of Employment + 6 years Unless the member of staff is part of an IICSA investigation and then it will need to retained until all IICSA enquires are complete.	Secure Disposal
Low Level Concern Log entries	Yes	Keeping Children Safe in Education	Date of termination + 6 years.	
Timesheets	Yes		Retained on the personnel file (Date of Termination + 6 Years)	Secure Disposal
Annual appraisal/assessment records	Yes		Retained on the personnel file (Date of Termination + 6 Years)	Secure Disposal
Staff Training-where training related to children (e.g., safeguarding or other child related training)	Yes		Retained on the personnel file (Date of Termination + 6 Years)	
Staff Training- not related to children e.g. Health and Safety, First Aid			Retained on the personnel file (Date of Termination + 6 Years)	
Staff Training-where training leads to Continuing professional development	Yes		Length of time required by the professional body	
Sickness and Absence Monitoring	Yes		Current Year + 3 Years (if sick pay is not paid)	

			Current Year + 6 years (if sick pay is paid)	
Sigle Central Record Entries	Yes	Keeping Children Safe in Education 2022	271. The details of an individual should be removed from the single central record once they no longer work at the school or college	

Management of Disciplinary and Grievance Processes				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Records relating to any allegations of a child protection nature against a member of staff.	Yes	"Keeping children safe in education Statutory guidance for schools and colleges September 2022"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children September 2022"	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 UNLESS it falls under the IICSA terms of reference, then they will need to be retained until the IICSA enquires are complete.	Secure Disposal
Disciplinary Proceedings	Yes			
• Oral warning	Yes		Date of warning + 6 months	Secure Disposal (if warning are placed on the personnel file, then they must be weeded from the file)
• Written warning – level 1	Yes		Date of warning + 6 months	
• Written warning – level 2	Yes		Date of warning + 12 months	
• Final warning	Yes		Date of warning + 18 months	

• Case not found	Yes		If the incident is child protection related, then see above otherwise dispose of at the conclusion of the case	Secure Disposal

Health and Safety

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Health and Safety Policy Statements	No		Life of policy + 3 years	Secure Disposal
Health and Safety Risk Assessments	No		Life of risk assessment + 3 years (Provided that a copy of the risk assessment is stored with the accident report if an incident occurs)	Secure Disposal
Accident reporting records relating to those over or under the age of 18 at the time of the incident	Yes		On the provision that there is an Accident book in place: + 3 years from the last entry of the book.	Secure Disposal
Records relating to any reportable death injury, disease or dangerous occurrence. (RIDDOR)	Yes		Date of Incident + 3 years, provided that all records relating to the incident are held in the individual's file.	Secure Disposal
Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Date of Incident + 40 years	Secure Disposal
Process of monitoring of areas where employees and persons are likely to have	No	Control of Asbestos at Work Regulations 2012 SI	Last action + 40 years	Secure Disposal

become in contact with asbestos		1012 No 632 Regulation 19		
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation: Maintenance Records or controls, safety features and PPE.	Yes	The Ionising Radiation Regulations 2017 S1 2017 No 1075 regulation 11	2 years from the date on which the examination was made.	Secure Disposal
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation: Dose Assessment and Recording	Yes	The Ionising Radiation Regulations 2017 S1 2017 No 1075 regulation 11 As amended by SI 2018 no390 Personal protective equipment (enforcement) regulations	Keep the records made and maintain until the person they relate to has or would have attained the age of 75 In any event 30 years from the record was made.	Secure Disposal
Fire Precautions logbooks	No		Current year + 3 years	Secure Disposal
Health and Safety File to show the current state of the building including al alterations e.g. plumbing, building woks	No		Pass to new owner on sale or transfer of building.	

Payroll and Pensions

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	Secure Disposal
National Insurance schedule of payments	Yes		Current Year + 6 years	Secure Disposal

Income tax form P60	Yes		Current year + 6 years	Secure Disposal
Absence Record	Yes		Current year + 3 years	Secure Disposal
Batches	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current Year + 6 Years	Secure Disposal
Bonus Sheets	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current Year + 3 Years	Secure Disposal
Car Loans	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Completion of Loans + 6 years	Secure Disposal
Car Mileage Output	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current year + 6 years	Secure Disposal
Elements: Compensation and benefit types that you give to your employees	No		Current year + 2 years	Secure Disposal
Members Allowance Register	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current Year + 6 years	Secure Disposal
Overtime sheets	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current Year + 3 years	Secure Disposal
Part time fee claims	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current Year + 6 Years	Secure Disposal
Pay Packet Receipt by employee	Yes		Current Year + 2 years	Secure Disposal
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	Secure Disposal
Pension Payroll	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Termination of Employment + 15* years	Secure Disposal

Pay Slips	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current year + 6 years	Secure Disposal
Payroll and Payroll Reports	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current year + 6 years	Secure Disposal
Personal Bank Details	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Until superseded + 3 years	Secure Disposal
Staff Returns	Yes		Current Year + 3 Years	Secure Disposal
Superannuation Adjustments and reports	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current year + 6 years	Secure Disposal
Insurance	Yes	Taxes Management Act 1970, Income and Corporation Tax 1988	Current year + 6 years	Secure Disposal
Tax Forms P6/P11D/P35/P45/P46/P48	Yes		Current Year + 6 Years	Secure Disposal
Timesheets/Clock cards/Flexitime	Yes		Current Year + 3 Years	Secure Disposal

*on advice from the Hillingdon Council, McCloud/Sargeant judgement allowance.

Financial Management of the School

This section deals with all aspects of the financial management of the school including the administration of school meals.

Risk Management and Insurance				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Employer's Liability Insurance Certificate	No		Closure of the school + 40 years (may be kept electronically)	Secure Disposal

Asset Management

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Inventories of furniture and equipment	No		Current year + 6 years	Secure Disposal
Burglary, theft and vandalism report forms	No		Current year + 6 years	Secure Disposal

Accounts and Statements including Budget Management

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Annual Accounts	No		Current year + 6 years	Secure Disposal
Loans and grants managed by the school	No		Date of last payment on the loan + 12 years then REVIEW	Secure Disposal
Student Grant applications	Yes		Current year + 3 years	Secure Disposal
All records relating to the creation and management of budgets including the Annual Budget statement and background papers	No		Life of the budget + 3 years	Secure Disposal
Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	Secure Disposal
Records relating to the collection and banking of monies	No		Current financial year + 6 years	Secure Disposal
Pupil Premium Fund Record	Yes	Limitations Act 1980	Date the pupil/student leaves the provision + 6 years	
Records relating to the identification and collection of debt	No		Current financial year + 6 years	Secure Disposal
Records Related to Gift Aid	No		Current financial year + 6 years	Secure Disposal

Contract Management				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	Secure Disposal
All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	Secure Disposal
Records relating to the monitoring of contracts	No		Life of contract + 6 years or 12 years (as above)	Secure Disposal

School Fund				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
School Fund - Cheque books	No		Current year + 6 years	Secure Disposal
School Fund - Paying in books	No		Current year + 6 years	Secure Disposal
School Fund – Ledger	No		Current year + 6 years	Secure Disposal
School Fund – Invoices	No		Current year + 6 years	Secure Disposal
School Fund – Receipts	No		Current year + 6 years	Secure Disposal
School Fund – Bank Statements	No		Current year + 6 years	Secure Disposal
School Fund – Journey Books	No		Current year + 6 years	Secure Disposal

School Meals Management				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**

Free School Meals Registers	Yes		Current year + 6 years	Secure Disposal
School Meals Registers	Yes		Current year + 3 years	Secure Disposal
School Meals Summary Sheets	No		Current year + 3 years	Secure Disposal

Property Management

This section covers the management of buildings and property.

Property Management				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Title deeds of properties belonging to the school	No		PERMANENT These should follow the property unless the property has been registered with the Land Registry	
Plans of property belong to the school	No		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	
Leases of property leased by or to the school	No		Expiry of lease + 6 years	Secure Disposal
Records relating to the letting of school premises	No		Current financial year + 6 years	Secure Disposal

Maintenance				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
All records relating to the maintenance of the school carried out by contractors incl. annual inspection reports/certificates	Yes		These should be retained whilst the building belongs to the school and should be passed to any new owners of the building is leased or sold.	Secure Disposal

			Annual inspection certificates can be destroyed once they have been superseded by the latest version.	
All records relating to the maintenance of the school carried out by school employees including maintenance logbooks incl. annual inspection reports/certificates	Yes		These should be retained whilst the building belongs to the school and should be passed to any new owners of the building is leased or sold. Annual inspection certificates can be destroyed once they have been superseded by the latest version	Secure Disposal

Pupil Management

This section includes all records which are created during the time a pupil spends at the school. For information about accident reporting see under Health and Safety above.

Admissions Process				
Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period**	**Action at the end of the administrative life of the record**
All records relating to the creation and implementation of the School Admissions' Policy	No		Life of the policy + 3 years then review	Secure Disposal
Admissions – if the admission is successful	Yes		Date of Admission + 1 Year	Secure Disposal
Admissions – if the appeal is unsuccessful	Yes		Resolution of case + 1 year	Secure Disposal
Admissions Schools – Casual – if offer is accepted	Yes		Current Year + 1 Year	Secure Disposal
Admissions – Schools – Casual – if offer is declined	Yes		Retain for 3 months	Secure Disposal

Proof of address supplied by parents as part of the admissions process	Yes		Current year + 1 year	Secure Disposal
Supplementary Information form including additional information such as religion, medical conditions etc.	Yes			
• For successful admissions			This information should be added to the pupil file	Secure Disposal
• For unsuccessful admissions			Until appeals process completed	Secure Disposal
Register of Admissions	Yes		Every entry must be preserved for 3 years from the point of entry. N.B SOME SCHOOLS MAY WANT TO PERMANENTLY PRESERVE THIS SO THEY CAN REPOND TO CONFIRMATION OF ATTENDANCE REQUESTS	

Pupil's Educational Record				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Pupil's Educational Record	Yes	The Education (Pupil information) (England) Regulations 2005 SI 2005 No. 1437		
• Primary			Retain while the child is a pupil at the School.	File should follow the pupil to their next location including Primary School, Secondary School or Secure Unit referral. If there is no next known location, then it should be held onto for DOB + 25 years.
• Secondary		Limitation Act 1980 (Section 2)	Date of Birth of the pupil + 25 years	Secure Disposal
Examination Results – Pupil Copies	Yes			

• Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board.
• Internal			This information should be added to the pupil file	
Child Protection information held on pupil file	Yes	"Keeping children safe in education Statutory guidance for schools and colleges September 2022"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children September2022"	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. Note these records will be subject to any instructions given by the IICSA	Secure Disposal
Child protection information held in separate files	Yes	"Keeping children safe in education Statutory guidance for schools and colleges September 2022"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children September 2022"	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 Note these records will be subject to any instructions given by the IICSA	Secure Disposal

Retention periods relating to allegations made against adults can be found in the Human Resources section of this retention schedule.

Pupil's Medical information and administration				
Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Permission slips for medical treatment – where no issue raised by child/parent	Yes		End of treatment + 1 month	Secure Disposal

Permission slips for medical treatment – medical conditions requiring ongoing management	Yes		Date of leaving + 1 year	Secure Disposal
Medical incidents with behavioural or safeguarding considerations	Yes		Date of incident + 25 years	Secure Disposal

Attendance				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Attendance Registers	Yes		Date of entry + 3 years	Secure Disposal
Attendance data incl within internal attendance initiatives	Yes		Date of leaving + 1 year	Secure Disposal
Correspondence relating to authorised absence	Yes	Education Act 1996 Section 7	Current academic year + 2 years	Secure Disposal
Exclusions	Yes		Date of leaving + 1 year	Secure Disposal

Special Educational Needs				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Special Educational Needs files, reviews and Individual Education Plans Including • Statements maintained under section 234 of the Education Act 1990 and any amendments made to the statement • Advice and information provided to parents	Yes	Children and Family's Act 2014 Special Educational Needs and Disability Act 2001 Section 1	Date of Birth of the pupil + 31 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.

regarding educational needs • Accessibility Strategy				

Statistics and Management Information				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Curriculum Returns	No		Current year + 3 years	Secure Disposal
Examination Results attainment/assessment Results (Schools Copy) incl electronic attainment trackers	Yes		Current year + 6 years	Secure Disposal
Individual SATS Records	Yes		Placed on the pupils education file and retained alongside that guidance.	Secure Disposal
Composite SATS Records	Yes		Current Year + 6 Years	Secure Disposal
SATS Examination Papers	No		Until the appeals/validation process is complete	
Published Admission Number (PAN) Reports	Yes		Current year + 6 years	Secure Disposal
Value Added and Contextual Data	Yes		Current year + 6 years	Secure Disposal
Self-Evaluation Forms	Yes		Current year + 6 years	Secure Disposal
Internal Moderation	Yes		Academic year + 1 academic year	Secure Disposal
External Moderation	Yes		Until superseded	Secure Disposal

Implementation of Curriculum				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Schemes of Work	No		Current year + 1 years	

Timetable	No		Current year + 1 years	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	No		Current year + 1 years	
Mark Books	No		Current year + 1 years	
Record of homework set	No		Current year + 1 years	
Pupils' Work	No		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

Extra-Curricular Activities

Educational Visits, Trips or Residentials outside the Classroom				
Basic file description	**Data Protection**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Parental consent forms for school trips where there has **been no major incident**	Yes		Conclusion of the trip	Although the consent forms could be retained for DOB + 25 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time.
Parental permission slips for school trips – where there has **been a major incident**	Yes	Limitation Act 1980 (Section 2)	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	
Financial information relating to a visit, trip or residential	Yes		Current year + 6 years	Secure Disposal
Field file e.g. information taken on a visit, trip or residential – **no major incident occurred**	Yes		Conclusion of the trip + 1 month	Secure Disposal

Field file e.g. information taken on a visit, trip or residential – **major incident occurred**	Yes		Conclusion of the trip + 25 years	Secure Disposal

After school clubs				
Basic file description	**Data Protection Issues**	**Statutory Provisions**	**Retention Period (Operational)**	**Action at the end of the administrative life of the record**
Parental consent forms for attendance at After School Clubs, where there has been no major incidents.	Yes		Date of register + 1 year	Secure Disposal Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time. Therefore this should be based on the functional lifespan of the document.
Attendance Registers for School Run After School Clubs where there has been no major incidents.	Yes		Date of register + 1 year	Secure Disposal Based on the based on the functional lifespan of the document.
Attendance Registers for 3rd Party After School Clubs where there has been no major incidents.	Yes		Weekly	Based on the based on the functional lifespan of the document.
Parent consent forms and attendance registers for school or 3rd party after school clubs where major incident has occurred	Yes		Date of event + 25 years	Secure Disposal

Walking Bus

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Walking Bus Register	Yes		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 backup copies should be destroyed at the same time]

Pastoral Family Liaison Officers and Home School Liaison Assistants

Basic file description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Day Books	Yes		Current Year + 2 years	Secure Disposal
Reports for outside agencies – where the report has been included on the case file created by the outside agency.	Yes		Whilst child is attending school then destroy	Secure Disposal
Referral forms	Yes		While the referral is current	Secure Disposal
Contact data sheets incl Pastoral Log	Yes		Current Year then review, if contact is no longer active then destroy	Secure Disposal
Contact database entries incl Pastoral Log	Yes		Current Year then review, if contact is no longer active then destroy	Secure Disposal
Group Registers incl parent workshops, ELSA sessions	Yes		Current Year + 2 years	Secure Disposal

Parent Teacher/Friends of Association and old Pupils Association (alumni)

Records relating to the creation and management of Parent Teacher Associations/Friends of and/or Old Pupil Associations (Alumni)	yes		Current Year + 6 years	Secure Disposal

Central Government and Local Authority

This section covers records created in the course of interaction between the school and the local authority.

Local Authority

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Attendance Returns	Yes		Current year + 1 year	Secure Disposal
Secondary Transfer Sheets (Primary)			Current year + 2 years	Secure Disposal
School Census Returns	No		Current year + 5 years	Secure Disposal
Circulars and other information sent from the Local Authority	No		Operational use	Secure Disposal

Central Government

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
OFSTED reports and papers	No		Life of the report then REVIEW	Secure Disposal
Returns made to central government	No		Current year + 6 years	Secure Disposal
Circulars and other information sent from central government	No		Operational use	Secure Disposal

Operational Items

Basic file description	Data Protection	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Google/Microsoft Forms used to attain data from pupils or staff.	Yes	N/A	6 months then Review	Secure Disposal.
Twitter Posts:	Yes	N/A	Current Year + 2 Years*	Secure Disposal
Facebook Posts:	Yes	N/A	Current Year + 2 Years*	Secure Disposal
Remote Learning Videos: Hosted on YouTube, Website, Vimeo etc.	Yes	N/A	Current Year + 1 Year+	Secure Disposal or moved to Archive for preservation of history.
Video Conferencing Recordings taken for safeguarding reasons.	Yes	N/A	12 months	Secure Disposal
News Archive/Feed if different to Newsletters	Yes	N/A	Current Year + 2 Years*	Secure Disposal
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No	N/A	Current year + 6 years then REVIEW	Secure Disposal
Emails in Staff Email Accounts	Yes	N/A	Recommended: 1. Teachers = 2 Years 2. SLT + Admin = 5-6 years 3. Generic/Shared Accounts e.g. Office@ = 5-6 years 4. Leavers: Delete	Secure Disposal
Emails in Pupil Email Accounts:	Yes	N/A	Recommended: 1. 1 Year	Secure Disposal
Electronic files kept in Shared Drives.	Yes	N/A	Recommended: 1-2 years	Secure Disposal
Electronic Files kept in Personal Drives	Yes	N/A	Recommended: 1-2 years Leavers: Delete	Secure Disposal

Staff Photos (Internal Displays, Visitor Administration System, Website, Social Media)	Yes	N/A	Current Staff: Until Updated Leavers: Delete/Destroy	Secure Disposal or moved to Archive for preservation of history.
Pupil Photos (Internal Displays, Visitor Administration System, Website, Social Media)	Yes	N/A	Recommend Maximum: Lifetime at school + 3 years. (Dependent on your Consent)	Secure Disposal or moved to Archive for preservation of history.
School Newsletter: Held on website and on internal systems.	Yes	N/A	Current year + 1 Academic Year	Secure Disposal or moved to Archive for preservation of history.
Closed Circuit Television (CCTV)	Yes	N/A	14 days	Secure Disposal
Records relating to Data Breaches, Subject Access Request & Freedom of Information Request responses.	Yes	Data Protection Act 2018, UK General Data Protection Regulation	6 Years	Secure Disposal

*depending on your consent criteria for use of images

+Special consideration should be made for staff who have left the organisation. Also that staff make take their own resources with them