

Retention Schedule  
(Draft)

Basic file description	Who is responsible for managing this data?	Retention Period	Destruction Method	System	Additional Notes
<b>Pupil Management</b>					
<b>Admissions and Attendance</b>					
Admission Registers	School Business Manager, Administration staff, Data Manager	Permanent	N/A	SIMS / School Server / Cloud Server / Pupil record folders	
Records relating to the admissions process – if the admission is successful	School Business Manager, Administration staff, Data Manager	Admission + 1 year	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Admissions – if the appeal is unsuccessful	School Business Manager, Administration staff, Data Manager	Resolution of case + 1 year	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Admissions – Secondary Schools – Casual	School Business Manager, Administration staff, Data Manager	Current year + 1 year	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Exclusions & Suspension	School Business Manager, Administration staff, Data Manager	DOB of the pupil + 25 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>Pupil Educational Record</b>					
Proofs of address supplied by parents as part of the admissions process	School Business Manager, Administration staff, Data Manager	Current year + 1 year	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Attendance registers	School Business Manager, Administration staff, Data Manager	Date of register + 3 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Medical and allergy information (including IHCP & PEEP)	School Business Manager, Administration staff, Data Manager	DOB of pupil + 25 years then review unless legal action is pending. If so, it may be appropriate to add an additional retention period.	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Letters authorising absence	School Business Manager, Administration staff, Data Manager	Date of absence + 2 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Pupil Files and/or record cards - Secondary	School Business Manager, Administration staff, Data Manager	DOB of the pupil + 25 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	In the case of exclusion it may be appropriate to transfer the record to the Local Authority Behaviour Service. If the pupil has left the school and there is no information about which school that the pupil has moved onto or they have moved onto elective home education, or the pupil has moved abroad or to an independent school then a recorded conversation with the LA about where the records are to be stored must take place.

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Examination results - Public	Examinations Officer, SLT, Head Teacher	Year of examinations + 6 years	Permanently deleted after retention period. Onsite Shredding	SIMS	Any certificates left unclaimed should be returned to the appropriate Examination Board.
Examination results - Internal examination results	Examinations Officer, SLT, Head Teacher	Current year + 5 years If these records are retained on the pupil file or in their National Record of Achievement they need only be kept for as long as operationally necessary	Permanently deleted after retention period. Onsite Shredding	SIMS	
Any other records created in the course of contact with pupils	School Business Manager, Administration staff, Data Manager	Current year + 3 years then review	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Images held of pupils together with any consents and permissions to publish	School Business Manager, Administration staff, Data Manager	All records relating to the image should be retained for the life of the image. The length of time the image is to be retained should be included on the privacy statement	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>Special Educational Needs</b>					
Special Educational Needs files, reviews and Individual Education Plans	School Business Manager, Administration staff, Data Manager / SENCO	DOB of the pupil + 25 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Statement of Special Educational Needs or EHCP	School Business Manager, Administration staff, Data Manager / SENCO	DOB + 30 years Unless legal action is pending	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Proposed EHCP or Draft Plan	School Business Manager, Administration staff, Data Manager / SENCO	DOB + 30 years Unless legal action is pending	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Advice and information to parents regarding educational needs	School Business Manager, Administration staff, Data Manager / SENCO	Closure + 12 years Unless legal action is pending	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Pupil SEN Files	School Business Manager, Administration staff, Data Manager / SENCO	DOB of pupil + 25 years then review unless legal action is pending. If so, it may be appropriate to add an additional retention period.	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>School Trips and Extra Curricular Activities</b>					
<b>Educational Visits outside the Classroom</b>					
<b>Day Trips</b>					
Parental permission slips for school trips – where there has been no major incident	School Business Manager, Administration staff, Data Manager	Conclusion of the trip	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	

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Parental permission slips for school trips – where there has been a major incident. Major incident e.g. reportable to HSC, potential claim injury.	School Business Manager, Administration staff, Data Manager	DOB of the pupil involved in the incident + 25 years The permission slips for all pupils on the trip need to be retained to show that the rules had been followed for all pupils	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>Residential Trips</b>					
All records relating to the organization of school residential trips	School Business Manager, Administration staff, Data Manager	Date of the residential visit + a minimum of 6 years then review	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>Management of School - Safeguarding</b>					
<b>Adults</b>					
Records of allegations about workers who have been investigated and found to be without substance	Governors, Head Teacher, Assistant Head Teacher, Designated Safeguarding Leads	These records should not normally be retained once an investigation has been completed.	Secure Shredding permanently deleted / data cleanse	CPOMS / SIMS	There are some exceptions to this where for its own protection the employer has to keep a limited record that an allegation was received and investigated, for example where the allegation relates to abuse and the worker is employed to work with children or other vulnerable adults
Outcome of an allegation made against a staff member	Governors, Head Teacher, Assistant Head Teacher, Designated Safeguarding Leads	Until the person has reached normal retirement age or for a period of 10 years from the date of the allegation if that is longer	Secure Shredding permanently deleted / data cleanse	CPOMS / SIMS	
<b>Children</b>					
Child abuse records (IISCA)	Governors, Head Teacher, Assistant Head Teacher, Designated Safeguarding Leads	retained for 75 years	Secure Shredding permanently deleted / data cleanse	CPOMS / SIMS	any record that relate or could relate to sexual abuse
<b>School Management - Teaching and Curriculum</b>					
<b>Senior Management Team</b>					
Minutes of the Senior Management Team and other internal administrative bodies	SLT, Head Teacher	Date of meeting + 5 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server	
Reports made by the Head Teacher or the management team	SLT, Head Teacher	Date of report + 3 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server	
Records created by Head Teachers, Deputy Head Teachers, and other members of staff with administrative responsibilities	SLT, Head Teacher, PA	Closure of file + 6 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server	
Correspondence created by Head Teachers, Deputy Head Teachers, Heads of Year and other members of staff with administrative responsibilities	SLT, Head Teacher, PA	Date of correspondence + 3 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server	

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Professional development plans	SLT, Head Teacher, PA	Closure + 6 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server	
<b>School Management - HR, Administration, Finance, Premises and Health &amp; Safety</b>					
<b>Personnel Management</b>					
Staff Personal files	Business Manager, Senior Administrator, Head Teacher	Termination + 6 years	Secure Shredding / data cleanse	SIMS / School Server	this includes online recruitment checks
Interview notes and recruitment records	Business Manager, Senior Administrator, Head Teacher	Date of interview + 6 months	Secure Shredding / data cleanse	SIMS / School Server	this includes online recruitment checks
Pre-employment vetting information (including DBS checks). Retain DBS cert no on SCR.	Business Manager, Senior Administrator, Head Teacher	Date of check + 6 months	Secure Shredding / data cleanse	SIMS / School Server / DBS Bulk Management LCC	Please note that schools must not keep copies of the documents which are checked for DBS purposes.
Proofs of identity collected as part of the process of checking "portable" enhanced DBS disclosure	Business Manager, Senior Administrator, Head Teacher	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.	Secure Shredding / data cleanse	SIMS / School Server / DBS Bulk Management LCC	
Online presence pre-employment check	Business Manager, Senior Administrator, Head Teacher	Termination of employment + 2 years	Secure Shredding / data cleanse	SIMS / School Server	Please note this will not be conducted for every employee.
Right to Work in the UK checks	Business Manager, Senior Administrator, Head Teacher	Termination of employment + 2 years	Secure Shredding / data cleanse	SIMS / School Server	
Disciplinary proceedings: case not found	Business Manager, Senior Administrator, Head Teacher	Take advice from HR Team if the proceedings were child protection related otherwise destroy immediately at the conclusion of the case	Secure Shredding / data cleanse	SIMS / School Server	
Disciplinary proceedings: written warnings	Business Manager, Senior Administrator, Head Teacher	The duration of the warning	Secure Shredding / data cleanse	SIMS / School Server	If this information has been added to an individual's personnel file, it must be weeded from the file once the retention period has elapsed
Annual appraisal or assessment records	Business Manager, Senior Administrator, Head Teacher, Line managers	Current year + 5 years	Secure Shredding / data cleanse	Bluesky / School Server	
Low level concerns	Business Manager, Senior Administrator, Head Teacher, Line managers	Dependant on the nature of the incident - minimum 24 months of the record	Secure Shredding / data cleanse	SIMS / School Server	
Images held of members of staff together with any consents and permissions to publish	Business Manager, Senior Administrator, Head Teacher	Specify in Privacy Notice how photos of members of staff will be used and duration of use.	When no longer in use.	SIMS / School Server	

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Staff personal information - e.g. medical appointments	Business Manager, Senior Administrator, Head Teacher	Review in line with HR guidance and school policy		SIMS / Optima Health	
<b>Health and Safety</b>					
Accessibility Plans	Governors, Head Teacher, SLT, Business Manager	Current year + 6 years	Secure Shredding / data cleanse	School Server / Network / Cloud Server	
Records relating to accident/injury at work	Governors, Head Teacher, SLT, Business Manager	Date of incident + 12 years	Secure Shredding / data cleanse	School Server / Network / Cloud Server	
Accident Reporting – Children	Governors, Head Teacher, SLT, Business Manager	Date of birth + 22 years where the injured person is a minor at the time of the accident. Severity of incident needs to be considered.	Secure Shredding / data cleanse	School Server / Network / Cloud Server	
Accident Reporting – Adults	Governors, Head Teacher, SLT, Business Manager	Date of the accident + 4 years where the injured person is an adult at the time of the accident;	Secure Shredding / data cleanse	School Server / Network / Cloud Server	
Incident reports	Governors, Head Teacher, SLT, Business Manager	Current year + 20 years	Secure Shredding / data cleanse	School Server / Network / Cloud Server	
<b>Payroll and Pensions</b>					
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Business Manager, Senior Administrator, Head Teacher	Current year + 6 years	Secure Shredding / data cleanse	SIMS / School Server / Network / Cloud Server / Any Comms/ Payroll LCC	
Maternity pay records	Business Manager, Senior Administrator, Head Teacher	Current year + 3yrs	Secure Shredding / data cleanse	SIMS / School Server / Network / Cloud Server / Any Comms/ Payroll LCC	
Timesheets, sick pay	Business Manager, Senior Administrator, Head Teacher	Current year + 6 years	Secure Shredding / data cleanse	SIMS / School Server / Network / Cloud Server / Any Comms/ Payroll LCC	
<b>Financial Records</b>					
Debtors' Records	Business Manager, Bursar	Current year + 6 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
Applications for free school meals, travel, uniforms etc	Business Manager, Bursar	Whilst child is at school	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
Other financial records	Business Manager, Bursar	Current year + 6 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
Student grant applications	Business Manager, Bursar	Current year + 3 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
<b>School Meals</b>					
Dinner Register	Catering Manager, Business Manager, Bursar	Current year + 3 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
Free school meals registers	Catering Manager, Business Manager, Bursar	Current year + 6 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	

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Visitors book	Catering Manager, Business Manager, Bursar	Current year + 2 years	Secure Shredding / data cleanse	FMS6 / SIMS / School Server / Cloud Server	
Images held of pupils together with any consents and permissions to publish	School Business Manager, Administration staff, Data Manager	Part of pupil record. Duration of pupil's attendance at school, if SEN or safeguarding duration of that whole record.	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Records relating to the management of PTA/Old Pupils Associations	School Business Manager, Administration staff, Data Manager	Current year + 6 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Records relating to the management of data subject access requests	School Business Manager, Administration staff, Data Manager	Current year + 3 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
Records relating to the management of freedom of information requests	School Business Manager, Administration staff, Data Manager	Current year + 3 years	Secure Shredding / data cleanse	SIMS / School Server / Cloud Server / Pupil record folders	
<b>Governing Board</b>					
<b>Governance Documents</b>					
Records relating to the appointment of foundation directors or governors	Clerk to Governors, Business Manager	Permanent	N/A	SIMS / GVO (School Leadership Systems)	
Records relating to the election of parent governors	Clerk to Governors, Business Manager	Date of election + 6 months	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to the election of chair and vice chair	Clerk to Governors, Business Manager	Once the decision has been recorded in the minutes, the records relating to the election can be destroyed	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Trust and LGB Minutes - Principal set (signed)	Clerk to Governors, Business Manager	Permanent	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Reports made to the Trust/LGB Meeting which are referred to in the minutes	Clerk to Governors, Business Manager	Permanent	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Register of attendance at Trust and LGB meetings	Clerk to Governors, Business Manager	Date of last meeting in the book + 6 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Minutes - Inspection copies	Clerk to Governors, Business Manager	Date of meeting + 3 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to Governor Monitoring Visits	Clerk to Governors, Business Manager	Date of the visit + 3 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to complaints made to and investigated by the Governing Body (ie stage 3 complaints)	Clerk to Governors, Business Manager, Governing Body	Date of resolution of complaint + 6 years then review for further retention in the case of contentious disputes	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Correspondence sent and received by the Governing Body	Clerk to Governors, Business Manager	Current year + 6 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	

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Appointment and termination of Trustees/Directors/Governors	Clerk to Governors, Business Manager	Maintain all records from date of termination + 6 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to the appointment of a clerk to the Trust/Governing Body	Clerk to Governors, Business Manager	Date appointment as clerk ceases + 6 years	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to the terms of office of serving directors/governors including evidence of appointment	Clerk to Governors, Business Manager	PERMANENT	N/A	SIMS / GVO (School Leadership Systems)	
Records relating to Director/Governor Declaration against disqualification criteria	Clerk to Governors, Business Manager	Until the Governor steps down	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Register of Business Interests	Clerk to Governors, Business Manager	PERMANENT	N/A	SIMS / GVO (School Leadership Systems)	
Director/Governors Code of Conduct signed	Clerk to Governors, Business Manager	This is expected to be a dynamic document, one copy of each version should be kept permanently	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to the training required and received by Director/ Governors	Clerk to Governors, Business Manager	Until the Governor steps down	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to the induction programme for new directors/governors	Clerk to Governors, Business Manager	Until the Governor steps down	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	
Records relating to DBS checks carried out on clerk, directors and members of the governing body (certificate number to be retained)	Clerk to Governors, Business Manager	Date of DBS check + 6 months	Secure Shredding / data cleanse	SIMS / GVO (School Leadership Systems)	