



# Records management and Retainment Policy



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## Key Personnel

Role	Name	Contact details
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## **Records management**

School records provide evidence for protecting the legal rights and interests of the school and provide evidence for demonstrating performance and accountability. This guidance document provides the framework through which this effective management is achieved.

This document applies to all records created, received or maintained by staff employed by schools' of The Edge Schools' Federation during the course of carrying out its function. Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a life span according to the corporate retention schedule – education and skills section) to provide evidence of its transactions or activities.

Records may be created or received and then stored in hard copy format or electronically.

### **School archive**

A small percentage of school records may be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the Shropshire Archives.

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

A list of the records sent to the archives should be created to include the information above. The contact details for Shropshire Archives is as follows:

County Archivist  
Shropshire Archives  
Castle Gates  
Shrewsbury  
SY1 2AQ  
Tel: 01743 255350  
Email: [archives@shropshire.gov.uk](mailto:archives@shropshire.gov.uk)

## **Responsibility**

Each school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with the overall responsibility is the Head of the School.

The Data Protection Officer will give guidance about good records management practice and will promote compliance, so that information will be retrieved easily, appropriately and in a timely way. **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.**

## **Relationships with existing policies**

This document has been prepared within the context of:

- Freedom of Information Act
- Data Protection policy and the General Data Protection Regulation (GDPR)
- With other legislation or regulations, including audit, equal opportunities and ethics affecting each school

## **Pupil records**

These guidelines are intended to help provide consistency of practice in the way in which pupil records are managed. The guidelines will assist school administrators by showing how pupil records should be managed and what kind of information should be maintained in the school.

### **Managing pupil records**

The pupil record is the core record charting an individual pupil's progress through the education system. The pupil record should accompany the pupil to every school they attend and should contain information that is accurate, objective and easy to access.

### **Electronic records**

Pupil records should be held electronically where possible. These records should be held on in a secure folder or system with access limited to those staff with relevant permission. Where possible, data should not be duplicated.

Pupil records should be stored as follows:

### **Scholarpack**

All key data for pupils should be stored on Scholarpack. *The information stored should be relevant and kept up to date* and include:

- Surname
- Forename
- DOB
- Special Educational Needs
- Emergency contact details
- The name of the child's doctor or surgery
- Gender
- Preferred name
- Ethnic origin [although this is "sensitive" data under the Data Protection Act 1998, the Department for Education require statistics about ethnicity]
- Language of home (if other than English)
- Religion [although this is "sensitive" data under the Data Protection Act 1998, the school has good reasons for collecting the information]
  - 1998, the school has good reasons for collecting the information]
- Any allergies or other medical conditions that it is important to be aware of [although this is "sensitive" data under the Data Protection Act 1998, the school has good reasons for collecting the information]
- Names of parents and/or guardians with home address and telephone number (and any additional relevant carers and their relationship to the child)
- Name of the school, admission number and the date of admission and the date of leaving.
- Any other agency involvement e.g. speech and language therapist, paediatrician
- If the pupil has attended an early years setting, then the record of transfer should be included

- Admission form (application form)
- Data permission forms
- Parental permission for photographs to be taken (or not)
- Annual Written Report to Parents
- Any information relating to a major incident involving the child (either an accident or other incident)
- Any reports written about the child
- Any relevant medical information
- Details of any complaints made by the parents or the pupil

Where relevant information has been received in a paper format it should be scanned and saved to the pupil record.

### **CPOMS**

All records regarding the following will be stored on CPOMS –

- Behaviour
- Safeguarding
- SEN reports and records
- EHCP

### **Secure electronic folder**

Information that falls outside of the requirements for Scholarpack and CPOMS should be held in a secure shared drive with limited staff access. Each folder should be labelled clearly with the child's name. **This is considered to be separate to the pupil record.**

As this information is subject to shorter retention periods if it is placed on the file then it will involve a lot of unnecessary weeding of the files before they are transferred on to another school.

Examples of information that may be kept in these folders are:

- Holiday request forms
- Absence notes
- Parental consent forms for trips/outings [in the event of a major incident all the parental consent forms should be retained with the incident report not in the pupil record]
- Correspondence with parents about minor issues

**The retentions schedule should be used as a guide as to where information should be stored.**

### **Storage of pupil records**

All pupil records should be kept securely always. Paper records, for example, should be kept in lockable storage areas with restricted access, and the contents should be secure within the file. Equally, electronic records should have appropriate security. Access arrangements for pupil records should ensure that confidentiality is maintained whilst equally enabling information to be shared lawfully and appropriately, and to be accessible for those authorised to see it.

**Where possible all records should be held electronically.**

## **Recording information**

A pupil or their nominated representative have the legal right to see their file at any point during their education and even until the record is destroyed (when the pupil is 25 years of age or 35 years from date of closure for pupils with special educational needs).

This is their right of subject access under the Data Protection Act 1998. It is important to remember that all information should be accurately recorded, objective in nature and expressed in a professional manner.

It is essential that these files, which contain personal information, are managed against the information security guidelines.

## **Transferring the pupil record to the secondary school**

The pupil record should not be weeded before transfer to the secondary school unless any records with a short retention period have been placed in the file.

Primary schools do not need to keep copies of any records in the pupil record, except if there is an ongoing legal action when the pupil leaves the school. Custody of and responsibility for the records passes to the school the pupil transfers to.

## **Responsibility for the pupil record once the pupil leaves the school**

The school which the pupil attended until statutory school leaving age (or the school where the pupil completed sixth form studies) is responsible for retaining the pupil record until the pupil reaches the age of 25 years. This retention is set in line with the Limitation Act 1980 which allows that a claim can be made against an organisation by a minor for up to 7 years from their 18th birthday.

## **Safe destruction of the pupil record**

The pupil record should be disposed of in accordance with the safe disposal of records guidelines.

## **Transfer of a pupil record outside the EU area**

If you are requested to transfer a pupil file outside the EU area because a pupil has moved into that area, please contact the Local Education Authority for further advice.

## **Retention Guidelines**

This retention schedule contains recommended retention periods for the different record series created and maintained by schools during their business. The schedule refers to all information regardless of the media in which it is stored.

Some of the retention periods are governed by statute. Others are guidelines following best practice. Every effort has been made to ensure that these retention periods are compliant with the requirements of the Data Protection Act 2018 and the Freedom of Information Act 2000.

Managing record series using these retention guidelines will be deemed to be 'normal processing' under the legislation mentioned above. If record series are to be kept for longer or shorter periods than laid out in this document the reasons for this need to be documented.

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## **1. Acknowledgements**

This retention schedule for schools is based on the guidelines issued by the Local Government Group of the Records Management Society of Great Britain and the Shropshire Council Education authority.

## **2. The purpose of the school retention schedule**

The purpose of the retention schedule Under the Freedom of Information Act 2000, schools are required to maintain a retention schedule listing the record series which the school creates during its business.

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.

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 all information, regardless of the media in which they are stored.

## **3. Benefits of a school retention schedule**

There are several benefits which arise from the use of a complete retention schedule:

- Managing records against the retention schedule is deemed to be 'normal processing' under the Data Protection Act 2018 and the Freedom of Information Act 2000.
- Providing staff are managing record series using the retention schedule, they cannot be found guilty of unauthorised tampering with files once a freedom of information request or a data subject access request has been made.
- Staff can be confident about destroying information at the appropriate time.
- Information which is subject to Freedom of Information and Data Protection legislation will be available when required.
- The school is not maintaining records and storing information unnecessarily.

## **4. Maintaining and amending the school retention schedule**

Where appropriate this retention schedule will be reviewed and amended to include any new record series created. It will also remove any obsolete record series.



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

### 5.1 Destruction of records

There 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 destroyed (shred hard copy) before disposal (if possible).

Any other records should be bundled up and disposed of to a waste-paper merchant or disposed of in other appropriate ways. The Freedom of Information Act 2000 requires the school to maintain a list of records which have been destroyed and who authorised their destruction. Staff should record at least:

- File reference (or another unique identifier)
- File title (or brief description)
- Number of files
- The name of the authorising officer. This could be kept in an Excel spreadsheet or other database format.

### 5.2 Transfer of records to Shropshire Archives

Where records have been identified as being worthy of permanent preservation, arrangements should be made to offer the records to Shropshire Archives. A list of the records sent to the archives should be created to include the information above. The contact details for Shropshire Archives are as follows:

Senior Archivist  
Shropshire Archives  
Castle Gates  
Shrewsbury  
SY1 2AQ  
Tel: 0345 678 9096  
Email: [archives@shropshire.gov.uk](mailto:archives@shropshire.gov.uk)

### 5.3 Transfer of information to other media

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

## 6. Useful Contacts

Name	Job Title	Contact
Dale Pitt	Records Manager	01743 252612
Tom Mullen	Data Protection Officer	01743 252774

**7.1 Child Protection: The retention and use of records relating to child protection matters concerning pupils, and child protection allegations against staff requires specific guidance in this schedule.**

Basic file description	Data Protection issues	Statutory Provisions	Retention period [operational]	Action at the end of the administrative life of the record
<b>Child protection files</b>	Yes	Keeping Children Safe in Education Guidelines	DOB + 25 yrs Once the child protection file is transferred, there is no need to keep a copy.	Ultimate disposal action: Destroy. Child Protection information should not be copied when children leave the school or college (where the child is still under 18, the information does not need to be sent to a university). Ensure the child protection file is transferred to the new school or college as soon as possible. This should be transferred separately from the main pupil file, ensuring secure transit and confirmation of receipt should be obtained. Where a child is removed from roll to be educated at home, the file should be sent to the Local Education Authority.
<b>Incident statements and supporting notes (Behaviour, SEN, bullying, domestic issues, safeguarding and pastoral care and child protection)</b>	Yes	ICO Guidance 2018	DOB + 25 yrs	Restricted access to sensitive incident records and data maintained on a secure remote server managed in the Child Protection Online Management System (CPOMS). CPOMS enables the school to track referrals to external agencies (NHS / Children's services / Police and communication with parents and carers. Hard copy records have the potential for 3 <sup>rd</sup> party access and sensitive data can be lost by potential fire and flooding. CPOMS is cloud based and allows a school to upload records to a hosted site to share. Records can be accessed securely from various types of devices and data is secured.

				Original copies do not need to be retained once the records have been uploaded and verified within CPOMS. Records in CPOMS conform to BS10008:2020, allowing for hard copy records to be destroyed. Records of files being transferred to another school that do not have CPOMS in place must be download as a hard copy file for any transfer This should be transferred separately as a hard copy file of all records and data, ensuring secure transit and confirmation of receipt should be obtained. Schools do not need to keep original documents once digitised within CPOMS, but where a decision is made locally to retain original documents, they must be retained securely.
<b>Allegations of abuse made against a Teacher or other staff, including where the allegation is unfounded</b>	Yes	Keeping Children Safe in Education Guidelines	Until the person's normal retirement age, or 10 yrs from the date of the allegation if that's longer	Once an unfounded investigation is completed, an employer may keep limited record that an allegation was received and investigated. For example, where the allegation relates to abuse and the person is employed to work with children, or other vulnerable individuals. A summary record may be retained on the confidential personnel file and a copy given to the person concerned.

<b>7.2 Governors</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Minutes</b>				
Principal set (signed)	No		Permanent	RETAIN in school for 6 yrs from date of meeting and then offer to Archives
Inspection copies	No		3 yrs from date of meeting	DESTROY – If these Minutes contain any sensitive information, they should be Destroyed
<b>Agendas</b>	No		Date of meeting	DESTROY
<b>Reports</b>			Date of meeting + 6 yrs	RETAIN in school for 6 yrs from date of meeting and then offer to Archives
<b>Annual parents' meetings</b>	No		Date of meeting + 6 yrs	RETAIN in school for 6 yrs from date of meeting and then offer to Archives
<b>Instruments of government</b>	No		Permanent	RETAIN in school whilst school is open and then offer to Archives
<b>Trusts and endowments</b>	No		Permanent	RETAIN in school whilst operationally required and then offer to Archives
<b>Action plans</b>	No		Date of plan + 3 yrs	DESTROY under normal circumstances, but consider offering to Archives for a sample to be taken if the school has been through a difficult period
<b>Policy documents</b>	No		Expiry of policy	RETAIN in school whilst operationally required. This includes if the expired policy is part of a past decision making process – offer to Archives

<b>7.3 School management</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Logbooks</b> [Books where the Head-teacher or another member of staff keeps of record of what happens in the school, this may include details of events, photographs and other information]	Yes	Activities of individual pupils and staff are subject to data protection	Date of last entry in the book + 6 yrs	RETAIN in the school for 6 yrs from the date of the last entry - Offer to Archives
<b>Minutes</b> [Senior Management Team and other internal administrative bodies]	Yes	Amended in consultation with Safe-guarding Children Group	Date of meeting + 5 yrs	RETAIN in school for 5 yrs from meeting and offer to Archives. The appropriate archivist will then take a sample for permanent preservation
<b>Head teacher reports</b> [Made by the Head Teacher or the Management Team]	Yes	Amended in consultation with Safe-guarding Children Group	Date of report + 3 yrs	RETAIN in school for 3 yrs from completion of report/meeting and offer to Archives. The appropriate archivist will then take a sample for permanent preservation
<b>School correspondence</b> created by all staff with administrative responsibilities (except child protection records which are dealt with in section 7.1 above).	Yes	Amended in consultation with Safe-guarding Children Group	Closure of file + 6 yrs	DESTROY - If these records contain sensitive information, they should be Destroyed

<b>7.3 School management</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Correspondence</b> created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	No		Date of correspondence + 3 yrs	DESTROY - If these records contain sensitive information, they should be Destroyed
<b>Professional development plans</b>	Yes		Closure + 6 yrs	DESTROY
<b>School development plans</b>	No		Closure + 6 yrs	REVIEW - Offer to Archives
<b>Employer's liability</b>	Yes		Permanent	Offer to Archives
<b>Performance reviews</b>	Yes		Permanent	Offer to Archives

<b>7.4 Pupils</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Admission registers</b>	Yes		Date of last entry in the book (or file) + 6 yrs	RETAIN in the school for 6 yrs from the date of the last entry - Offer to Archives
<b>Attendance registers</b>	Yes		Date of register + 3 yrs	DESTROY - If these records are retained electronically, any back-up copies should also be destroyed at the same time
<b>Pupil record cards</b>	Yes			
<i>Primary</i>	Yes		RETAIN for the time which the pupil remains at the school	Transfer to the secondary school (or other primary school) when the child leaves the school - In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service
<i>Secondary</i>	Yes		DOB of the pupil + 25 yrs (not SEN)	DESTROY – In the case of exclusion, it may be appropriate to transfer the record to the Behaviour Service
<b>Pupil files</b>	Yes			
<i>Primary</i>			RETAIN for the time which the pupil remains at the school	Transfer to the secondary school (or other primary school) when the child leaves the school - In the case of exclusion, it may be appropriate to transfer the record to the Behaviour Service

<b>7.4 Pupils</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<i>Secondary</i>	Yes		DOB of the pupil + 25 yrs	DESTROY – In the case of exclusion, it may be appropriate to transfer the record to the Behaviour Service
<b>Deceased pupil files (Primary and Secondary)</b>	Yes		7 yrs after the Pupil has died	Destroy. (Death occurs outside of education environment)
<b>Special Educational Needs files, reviews &amp; Individual plans</b>	Yes		DOB of the pupil +35 yrs	DESTROY – In the case of exclusion, it may be appropriate to transfer the record to the Behaviour Service
<b>Letters authorising absence</b>	No		Date of absence + 2 yrs	DESTROY
<b>Absence books</b>	No		Current yr + 6 yrs	DESTROY
<b>Examination results</b>	Yes			
<i>Public</i>	No		Yr of examinations + 6 yrs	DESTROY – Any certificates left unclaimed should be returned to the examination board.
<i>Internal examination results</i>	Yes		Current yr +5 yrs	DESTROY – If records are retained on the pupil file, or National Records of Achievement, they need only be



				kept for as long as operationally necessary.
<b>7.4 Pupils</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Pupil correspondence</b>	Yes		Current yr + 3 yrs	REVIEW – Consider allocating a further retention period or DESTROY
<b>Statement maintained under Education Act 1996 - Section 324</b>	Yes	Special Educational Needs and Disability Act 2001 - Section 1	DOB + 30 yrs	DESTROY – Unless legal action is pending
<b>Proposed statement or amended statement</b>	Yes	Special Educational Needs and Disability Act 2001 - Section 1	DOB + 30 yrs	DESTROY – Unless legal action is pending
<b>Advice and information to parents regarding educational needs</b>	Yes	Special Educational Needs and Disability Act 2001 - Section 2	Closure + 12 yrs	DESTROY – Unless legal action is pending
<b>Accessibility strategy</b>	Yes	Special Educational Needs and Disability Act 2001 – Section 14	Closure + 12 yrs	DESTROY – Unless legal action is pending
<b>Children SEN files</b>	Yes		Closure + 35 yrs	DESTROY – Unless legal action is pending

<b>7.5 Curriculum</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Curriculum development</b>	Yes		Current yr + 6 yrs	DESTROY
<b>Curriculum returns</b>	No		Current yr + 3 yrs	DESTROY
<b>School syllabus</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Schemes of work</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Timetable</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Class books</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Mark books</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Records of homework set</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period
<b>Pupil's work</b>	No		Current yr + 1 yr	DESTROY - It may be appropriate to review these records at the end of each year and allocate a new retention period

<b>7.5 Curriculum</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>SATS results</b>	Yes		Current yr + 6 yrs	These records should be Destroyed
<b>PANDA reports</b>	Yes		Current yr + 6 yrs	These records should be Destroyed

<b>7.6 School personnel</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Timesheets, sick pay</b>	Yes	Financial Regulations	Current yr + 6 yrs	DESTROY
<b>Staff personal files</b>	Yes		Termination + 15 yrs	DESTROY
<b>Interview notes and recruitment records</b>	Yes		Date of interview + 1 yr	DESTROY
<b>Pre-employment vetting information – including unsuccessful CRB checks</b>	No	CRB guidelines	Date of check + 1 yr	DESTROY – This information should be placed on the personnel file if the applicant is successful
<b>Disciplinary files (not child protection – see 7.1)</b>	Yes			
<i>Oral warning</i>	Yes		Date of warning + 6 months	DESTROY – If this is placed on a personal file, it must be weeded from file
<i>Written warning – Level one</i>	Yes		Date of warning + 6 months	DESTROY – If this is placed on a personal file, it must be weeded from file
<i>Written warning – Level two</i>	Yes		Date of warning + 1 yr	DESTROY – If this is placed on a personal file, it must be weeded from file
<i>Final warning</i>	Yes		Date of Warning + 2 yrs	DESTROY – If this is placed on a personal file, it must be weeded from file
<i>Case not found</i>	Yes		DESTROY	Immediately at the conclusion of the case. except Child Protection allegations (see 7.1)
<b>Annual appraisal and assessment records</b>	No		Current yr + 6 yrs	DESTROY

<b>7.6 School personnel</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Timesheets, sick pay</b>	Yes	Financial Regulations	Current yr + 6 yrs	DESTROY
<b>Salary cards</b>	Yes		Last date of employment + 6 yrs	DESTROY – The information should be transferred to the superannuation department at the appropriate time who will maintain the master record
<b>Maternity pay records</b>	Yes	Statutory maternity pay	Current yr + 3 yrs	DESTROY
<b>Records held under retirement benefits schemes</b>	Yes	Information Powers Regulations 1995	Last payment + 6 yrs	DESTROY

<b>7.7 School health and safety</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Accessibility plans</b>	No	DDA	Current yr + 6 yrs	DESTROY
<b>Accident reporting</b>	Yes			
<i>Adults – Accident book</i>	Yes		Last entry in book + 6 yrs	DESTROY
<i>Adults – Internal reports</i>	Yes		Current yr + 6 yrs	DESTROY
<i>Children</i>	Yes		DOB + 25 yrs	DESTROY – A child may make a claim for negligence 7 yrs from their 18 <sup>th</sup> birthday. All records are kept until the pupil reaches the age of 25 yrs.
<b>Records relating to serious injury at work</b>	Yes		Date of incident + 12 yrs	REVIEW
<b>COSHH</b>	Yes		Current yr +10 yrs	REVIEW
<b>Incident reports</b>	Yes		DOB + 25 yrs	DESTROY
<b>Risk assessments</b>	Yes		Date assessment superseded+ 3 yrs	DESTROY
<b>Asbestos monitoring</b>	Yes		Last action + 40 yrs	DESTROY – The process where employees and persons are likely to have encounter asbestos
<b>Radiation monitoring</b>	Yes		Last action + 50 yrs	DESTROY – The process where employees and persons are likely to have contact with radiation

<b>7.8 School administration</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Employer's liability certificate</b>	Yes		Permanent whilst the school is open	Retain for 40 yrs after the school has closed
<b>School brochure/prospectus</b>	Yes		Current yr + 3 yrs	Offer to Archives - The appropriate archivist will then take a sample for permanent reservation
<b>Circulars (staff/parents/pupils)</b>	No		Current yr + 1 yr	DESTROY
<b>Newsletters</b>	No		Current yr + 1 yr	REVIEW to see whether any further retention is required - Offer to Archives [The appropriate archivist will then take a sample for permanent reservation]
<b>Visitor's book</b>	No		Current yr + 2 yrs	REVIEW to see whether any further retention is required - Offer to Archives [The appropriate archivist will then take a sample for permanent reservation]
<b>PTA/old pupils' associations</b>	Yes		Current yr + 6 yrs	Offer to Archives - The appropriate archivist will then take a sample for permanent reservation
<b>Cooks' daybook</b>	No		Current yr + 3 yrs	DESTROY
<b>Dinner register</b>	No		Current yr + 3 yrs	DESTROY
<b>Leaflets and publications</b>	No		When superseded	DESTROY

<b>7.9 School finance</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Annual accounts</b>	Yes	Financial Regulations	Current yr + 6 yrs	Offer to Archives
<b>Loans and grants</b>	Yes	Financial Regulations	Date of last payment on loan + 12 yrs	REVIEW to see whether any further retention is required - Offer to Archives [The appropriate archivist will then take a sample for permanent reservation]
<b>Contracts</b>				
<i>Under seal</i>	Yes		Contract completion date + 12 yrs	REVIEW to see whether any further retention is required - Offer to Archives [The appropriate archivist will then take a sample for permanent reservation]
<i>Under signature</i>	Yes		Contract completion date + 6 yrs	DESTROY
<b>Budget monitoring reports</b>	Yes		Current yr + 3 yrs	DESTROY
<b>Invoices and receipts covered by financial regulations</b>	Yes		Current yr + 6 yrs	DESTROY
<b>Order books and requisitions</b>	No		Current yr + 6 yrs	DESTROY
<b>Delivery notes</b>	No		Current yr + 1 yr	DESTROY
<b>Debtors' records</b>	Yes		Current yr + 6 yrs	DESTROY
<b>School fund records covered by financial regulations</b>	Yes		Current yr + 6 yrs	DESTROY



<b>7.9 School finance</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Applications for free school meals, travel, uniforms</b>	Yes		Whilst child is at school	DESTROY
<b>Student grant applications</b>	Yes		Current yr + 3 yrs	DESTROY
<b>Free school meals registers</b>	Yes	Financial Regulations	Current yr + 6 yrs	DESTROY
<b>Petty cash books</b>	No	Financial Regulations	Current yr + 6 yrs	DESTROY

<b>7.10 School property</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Title deeds</b>	Yes		Permanent	These should follow the property – Offer to Archives
<b>Plans</b>	Yes		Permanent	Retain until superseded and offer to Archives
<b>Maintenance and contracts</b>	Yes	Financial Regulations	Current yr + 6 yrs	DESTROY
<b>Leases</b>	Yes		Expiry of lease + 6 yrs	DESTROY
<b>Lettings</b>	Yes		Current yr + 3 yrs	DESTROY
<b>Burglary, theft and vandalism reports</b>	No		Current yr + 6 yrs	DESTROY
<b>Maintenance logbooks</b>	Yes		Last entry + 10 yrs	DESTROY
<b>Contractors' reports</b>	Yes		Current yr + 6 yrs	DESTROY
<b>Inventory</b>	No		Current yr + 6 yrs	DESTROY

<b>7.11 LA</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Secondary transfer sheets (Primary)</b>	Yes		Current yr + 2 yrs	DESTROY
<b>Attendance returns</b>	Yes		Current yr + 1 yr	DESTROY
<b>Circulars from LA</b>	No		Whilst operationally required	REVIEW to see whether a further retention period is required – Offer to Archives
<b>Admissions data</b>	Yes		Current yr + 5 yrs	DESTROY/DELETE
<b>Student enrolment</b>	Yes		Current yr = 2 yrs	DESTROY

<b>7.12 DCSF</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>HMI reports</b>	No		These do not need to be kept any longer	If any are retained - Offer to Archives
<b>OFSTED reports and papers</b>	Yes		Replace former report with any new inspection report	REVIEW to see whether a further retention period is required – offer to Archives
<b>Returns</b>	No		Current yr + 6 yrs	DESTROY
<b>Circulars from DCSF</b>	No		Whilst operationally required	REVIEW to see whether a further retention period is required – offer to Archives

<b>7.13 Partnership working</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Service level agreements</b>	Yes		Until superseded	DESTROY
<b>Work experience agreement</b>	Yes		DOB of child + 18 yrs	DESTROY

<b>7.14 School meals</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Dinner register</b>	No		Current yr + 3 yrs	DESTROY
<b>School meals summary sheet</b>	No		Current yr + 3 yrs	DESTROY
<b>Free school meals register</b>	Yes		Current yr + 6 yrs	DESTROY
<b>Free school meals vouchers</b>	Yes		Current yr + 5 yrs	DESTROY
<b>School meals vouchers</b>	No		Current yr + 5 yrs	DESTROY

<b>7.154 Schools and colleges</b>				
<b>Basic file description</b>	<b>Data Protection issues</b>	<b>Statutory Provisions</b>	<b>Retention period [operational]</b>	<b>Action at the end of the administrative life of the record</b>
<b>Tutor folders</b>	Yes		Termination + 6 yrs	DESTROY
<b>Potential tutors</b>	Yes		Current yr + 2 yrs	DESTROY
<b>Ex tutor folders</b>	Yes		Termination + 15 yrs	DESTROY
<b>Student enquiry files</b>	Yes		Current yr + 2 yrs	DESTROY
<b>Student support files and finance</b>	Yes		Current yr + 6 yrs	DESTROY

## **8. European funded records**

Where any record relates to a project that is funded by a European Union (EU) programme, it is essential that all the records are retained together.

All EU funded records (including finance) can only be disposed of **after** the EU funded programme has been nationally signed off. Therefore, records associated with an EU funded programme have a different life cycle to other similar records listed within the Retention Schedule.

## **9. Finding the School retention schedule**

The School retention guidance can be found on the Shropshire Learning Gateway:

[Retention Policy – Shropshire Learning Gateway \(shropshirelg.net\)](http://shropshirelg.net)

The Schools Retention Schedule is also available in the Education and skills worksheet of the Corporate Retention Schedule at:

- Shropshire Council website:  
<https://www.shropshire.gov.uk/privacy/your-privacy/>
- Shropshire Council intranet:  
[What is the corporate retention schedule? - SC Intranet \(shropshire.gov.uk\)](http://shropshire.gov.uk)