

Information Audit and Record Retention Schedule

Area	Section	File Description	Retention Period	Retention Notes	End of Life Disposal
Administration	Pupil	Data Sheet - pupils	02 Years	After leaving	Secure Disposal
Administration	Communication	Newsletters	02 Years		Secure Disposal
Administration	General	Questionnaires Surveys	02 Years		Secure Disposal
Administration	Safeguarding and Child Protection	Child Protection allegation against member of staff	10 years after retirement age	10 Years after the persons normal retirement age or 10 years from date of the allegation, whichever is longer	Secure Disposal
Administration	Safeguarding and Child Protection	Disciplinary - Final Warning - if Child Protection related	10 years after retirement age	10 years after the persons normal retirement age or 10 years from date of the allegation, whichever is longer	Secure Disposal
Administration	Personnel	Disciplinary - Written Warning Stage 2	13 Months		Secure Disposal
Administration	Health & Safety	Accident/Injury relating to injury at work/school	Date of incident plus 12 Years	Date of incident plus 12 years Review - If serious further retention	Secure Disposal
Administration	Educational Visits	Approval to run educational visit outside the classroom	7 Years	Date of visit plus 7 Years unless there was an incident then further retention	Secure Disposal
Administration	Personnel	Disciplinary - Final Warning - if member of staff remains in employment	19 Months		Secure Disposal
Administration	Health & Safety	Accident Reporting - Children. Assessnet/RIDDOR	25 years	Date of Birth plus 25 Years	Secure Disposal
Administration	Attendance	Absence Correspondence	3 years		Secure Disposal

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Administration	Attendance	Attendance Register of Admissions - SIMS	4 Years		Secure Disposal
Administration	Personnel	Maternity Pay Records	4 Years		Secure Disposal
Administration	Communication	Correspondence	4 years	Review at 4 years	Secure Disposal
Administration	Pupil	Minutes of meetings with parents/pupils	4 years	Review at 4 years	Secure Disposal
Administration	Health & Safety	COSHH	41 Years		Secure Disposal
Administration	Health & Safety	Asbestos - LAMP and Asbestos Report	41 Years		Secure Disposal
Administration	DFE/Local Authority	Census Returns	6 Years		Secure Disposal
Administration	Health & Safety	Accident Reporting - Adults. Assessnet/RIDDOR	6 Years	Date of accident plus 6 years	Secure Disposal
Administration	Personnel	Staff records appointment - unsuccessful	7 Months		Secure Disposal
Administration	General	Minutes of meetings	7 Years		Secure Disposal
Administration	Personnel	Head Teacher appointment all records	7 Years		Secure Disposal
Administration	Personnel	Staff Personnel Files	7 Years		Secure Disposal
Administration	Health & Safety	Fire Precaution Log Books	7 Years		Secure Disposal
Administration	Personnel	Retirement Benefits Records	7 Years		Secure Disposal
Administration	Premises	Lettings	7 Years		Secure Disposal
Administration	Premises	Maintenance records & Log Books	7 Years		Secure Disposal
Administration	Management	Planned Admission Number PAL	7 Years		Secure Disposal
Administration	General	General Files	7 Years		Secure Disposal
Administration	Health & Safety	Visitors Log	7 Years	Review at 7 years	Secure Disposal
Administration	PFA	PFA records	7 Years	Review at 7 years	Secure Disposal
Administration	PFA	Minutes of meetings	7 years		Secure Disposal

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Administration	Personnel	Staff - successful candidate records, incl Head Teacher	Add to the staff personnel file		
Administration	Personnel	Pre employment vetting for right to work in UK	Add to the staff personnel file		
Administration	Personnel	Pre employment vetting for DBS	Add to the staff personnel file if necessary		Secure Disposal
Administration	Educational Visits	Parental Consent Forms for trips where there as been no major incident	Conclusion of the trip		Secure Disposal
Administration	Pupil	Pupil Records - SIMS	CTF to next school. Only retain whilst pupil is at school.		Secure Disposal
Administration	Pupil	Assessment Results incl SATS	CTF to next school. Only retain whilst pupil is at school.	The next school to keep DOB plus 25 Years	Secure Disposal
Administration	Educational Visits	Parental Consent Forms for trips where there as been a major incident	DOB of the pupil involved plus 25 years		Secure Disposal
Administration	Premises	Leases of property to school-Wraggy	Expiry of lease plus 6 Years		Secure Disposal

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Administration	Health & Safety	Risk Assessments	Life of Assessment plus 3 years		Secure Disposal
Administration	Safeguarding and Child Protection	Child Protection Records held in separate file from pupil record	Pass to next school and destroy.	The next school to keep DOB plus 25 Years	Secure Disposal
Administration	Premises	Plans of School	Permanent		
Administration	Pupil	Medical Health Care Plan	Pass to next school and destroy.	The next school to keep DOB plus 25 Years	
Administration	Personnel	Disciplinary - Final Warning - case not found	Until conclusion of case		Secure Disposal
Administration	Health & Safety	General Accident log	7 Years		Secure Disposal
Central Government	DFE/Local Authority	Returns made to Central Government	7 Years		Secure Disposal
Central Government	OFSTED	OFSTED reports	Life of report then review		Secure Disposal
Central Government	DFE	Circulars from Central Government	Operational Use		Secure Disposal
Financial	Financial	Loans and Grants managed by school	12 Years	from last payment date	Secure Disposal
Financial	School Meals	School Meal summary Sheets	7 Years		Secure Disposal
Financial	Financial	Budget Information and Annual Budget Statement, including papers	7 years	life plus 3	Secure Disposal
Financial	Financial	School Meal Registers	7 Years		Secure Disposal
Financial	Financial	Time Sheets	7 Years		Secure Disposal

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Financial	Financial	Inventory	7 Years		Secure Disposal
Financial	Financial	Burglary, theft, vandalism report forms	7 Years		Secure Disposal
Financial	Financial	Annual Accounts	7 Years		Standard Disposal
Financial	Financial	Invoices, receipts, order books, requisitions, delivery notices	7 Years		Secure Disposal
Financial	Financial	Records relating to collection & banking of Monies	7 Years		Secure Disposal
Financial	Financial	Records relating to the identification and collection of debt	7 Years		Secure Disposal
Financial	Financial	Free School Meals Registers	7 Years		Secure Disposal
Financial	Local Authority	Employers Liability Insurance Certificate	Closure of school plus 40	Held by the Local Authority	Secure Disposal
Governor	Governance	Questionnaires Surveys	02 Years		Secure Disposal
Governor	Governance	Annual Reports	11 years		Secure Disposal
Governor	Governance	Policy Documents	3 years		Secure Disposal
Governor	Governance	Change of status e.g. acadamy, special status	4 years		Secure Disposal
Governor	Governance	Action Plans	4 years	life plus 3	Secure Disposal
Governor	Governance	Meetings, Agenda (not with Minutes)	6 Years		Secure Disposal

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Governor	Governance	Reports presented to the Governing Body NOT mentioned	6 Years		Secure Disposal
Governor	Governance	Complaints dealt with by Governing Body	7 Years	Review at 7 years	Secure Disposal
Governor	Governance	General Correspondence	7 years		Secure Disposal
Governor	Health & Safety	H&S Policy	Life of Policy plus 3 years		Secure Disposal
Governor	Governance	Meetings, Minutes & 1 copy of Agenda	Permanent		Permanent
Governor	Governance	Reports presented to the Governing Body mentioned in minutes	Permanent		Permanent
Governor	Governance	Instruments of Governance/Articles of	Permanent		Permanent
Head Teacher	Management	School Development Plans	10 years	from closure of plan	Secure Disposal
Head Teacher	SEN	Statements and all information provided to parents	25 years	Date of Birth plus 25 Years	Secure Disposal unless subject to a legal hold
Head Teacher	SEN	Accessibility Strategy	25 years	Date of Birth plus 25 Years	Secure Disposal unless subject to a legal hold
Head Teacher	SEN	SEN Files, reviews, EHCP And all information provided to parents	25 years	Date of Birth plus 25 Years	Secure Disposal unless subject to a legal hold
Head Teacher	Management	Professional Development Plans	4 Years		Secure Disposal
Head Teacher	Management	Prospectus	4 Years		Standard Disposal

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Head Teacher	Personnel	Staff annual appraisals/assessment records	6 Years		Secure Disposal
Head Teacher	Personnel	Disciplinary - Oral Warning Note & Written Warning Stage 1	7 Months		Secure Disposal
Head Teacher	Personnel	Disciplinary - Final Warning - if member of staff leaves employments	7 Years		
Head Teacher	Management	Value Added and Contextual Data	7 Years		Secure Disposal
Head Teacher	Management	Self Evaluation Forms	7 Years		Secure Disposal
Head Teacher	Pupil	Reports	7 Years	Review at 7 years	Secure Disposal
Head Teacher	Management	Minutes of meetings	7 years		Secure Disposal
Head Teacher	General	Log Books (old stored in HT office)	Permanent		Permanent
Local Authority	Attendance	Attendance Returns	02 Years		Secure Disposal
Local Authority	Local Authority	Circulars from LA	End of		Secure Disposal
Teacher	Curriculum	Schemes of Work	End of operational		Secure Disposal
Teacher	Curriculum	Record of Homework set	End of operational use		Secure Disposal
Teacher	Curriculum	Pupils Work	Return to pupils in October each year		Secure Disposal