

<b>Governing Body</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Agendas for Governing Body meetings	Paper	PERMANENT. One copy should be retained with the master set of minutes. All other copies can be disposed of.	N/A
	Electronic	Current year + 1 year	Deletion
Minutes of Governing body meetings (Principal signed set)	Paper	PERMANENT	N/A
Minutes of Governing body meetings	Paper / electronic	6 years	Secure disposal / deletion
Reports presented to the Governing body.	Paper	6 years	Secure disposal
	Electronic	Current year + 1 year	Deletion
Instruments of Government including Articles of Association	Paper	PERMANENT	N/A
Action plans created and administered by the Governing body.	Paper / electronic	Life of the action plan +3 years	Secure disposal / deletion
Policy documents created and administered by the Governing body.	Paper / electronic	Life of the policy +3 years	Secure disposal / deletion
Records relating to complaints dealt with by the Governing body.	Paper	Date of the resolution of the complaint + minimum of 6 years then review for further retention in case of contentious disputes.	Secure disposal

<b>Head Teacher and Senior Management</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Log books of activity in the school maintained by the Head Teacher	Paper	PERMANENT	N/A
Minutes of Senior Management team meetings and staff meetings	Electronic	Date of the meeting + 3 years then review	Deletion
Correspondence created by head teachers, deputies, heads of year & other members of staff with admin responsibilities.	Electronic	Date of correspondence + 3 years then review	Deletion
Professional Development Plans	Electronic	Life of the plan + 6 years	Deletion

<b>Operational Administration</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Records relating to the creation and publication of the school prospectus	Electronic	Current year + 3 years	Deletion

Records relating to the creation & distribution of circulars to staff, parents, pupils	Electronic	Current year + 1 year	Deletion
Visitors book & signing in sheets.	Electronic	Current year + 6 years then REVIEW	Deletion

Recruitment	Paper / electronic	Retention Period	Action at end
Records leading to appointment of headteacher	Paper	Date of appointment + 6 years	Secure disposal
Records leading to appointment of staff member - unsuccessful candidates.	Paper	Date of appointment + 6 months.	Secure disposal
Records leading to appointment of staff member - successful candidates.	Paper	Information should be added to staff personnel file & other info retained for 6 months.	Secure disposal of other info.
Pre-employment vetting information - DBS checks.	Paper	The school does not keep copies of DBS certificates.	N/A
Proofs of ID collected for checking portable enhanced DBS disclosure.	Paper	Record of what was checked noted in SCR. No copies kept as proof of ID.	N/A
Pre-employment vetting information - evidence proving right to work in UK.	Paper	Added to staff personnel file. Termination of employment + 6 years.	Secure disposal
Staff Personal File	Electronic	Termination of employment + 6 years	Deletion
Timesheets	Paper	Current year + 6 years	Secure disposal
Annual appraisal/assessment records	Paper	Current year + 5 years.	Secure disposal

Management of disciplinary & grievance processes	Paper / electronic	Retention Period	Action at end
Allegation of a child protection nature against a member of staff including where the allegation is unfounded.	Paper	Until the person's normal retirement age or 10yrs from the date of the allegation whichever is the longer then review. Note allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned.	Secure disposal
Disciplinary proceedings: Oral warning	Electronic	Date of warning + 6 months	Deletion
Disciplinary proceedings: Written warning - level 1	Electronic	Date of warning + 6 months	Deletion
Disciplinary proceedings: Written warning - Level 2	Electronic	Date of warning + 12 months	Deletion
Disciplinary proceedings: Final warning	Electronic	Date of warning + 18 months	Deletion
Disciplinary proceedings: Case not found	Electronic	If the incident is child protection related then see the above otherwise dispose of at the conclusion of the case	Deletion

<b>Health &amp; Safety</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Health & safety policy statements	Electronic	Life of policy + 3 yrs	Deletion
Health & safety Risk assessments	Paper / electronic	Life of assessment + 3 yrs	Secure disposal / deletion
Records relating to accident / injury at work	Paper / electronic	Date of incident + 12 yrs. In the case of serious accidents a further retention period will be applied.	Secure disposal / deletion
Accident reporting	Paper	Adults - Date of incident + 6 years	Secure disposal
	Paper / electronic	Children - DOB of child + 25 years	Secure disposal / deletion
Control of Substances Hazardous to Health (COSHH)	Paper	Current year + 40 years	Secure disposal
Premises Asbestos Management Plan	Paper / electronic	Last action + 40 years	Secure disposal / deletion
Fire Register	Paper	Current year + 6 years	Secure disposal
Healthcare plans	Paper	Whilst the pupil remains at the school	Secure disposal

<b>Asset Management</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Inventories of furniture & equipment	Electronic	Current year + 6 years	Deletion
Burglary, theft & vandalism report forms	Electronic	Current year + 6 years	Deletion

<b>Accounts &amp; Statements incl Budget Management</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Annual Accounts	Paper / electronic	Current year + 6 years	Secure disposal / deletion
All records relating to creation & management of budgets incl annual budget statement & background papers	Paper / electronic	Life of budget + 3 years	Secure disposal / deletion
Invoices, receipts, order books & requisitions, delivery notices	Paper / electronic	Current financial year + 6 years	Secure disposal / deletion
Records relating to the collection & banking of monies	Paper / electronic	Current financial year + 6 years	Secure disposal / deletion
Records relating to the identification & collection of debt	Paper / electronic	Current financial year + 6 years	Secure disposal / deletion

<b>Contract Management</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
All records relating to the management of contracts under seal	Paper	Last payment on contract + 12 years	Secure disposal
All records relating to the management of contracts under signature.	Paper	Last payment on contract + 6 years	Secure disposal

Records relating to the monitoring of contracts.	Paper	Current year + 2 years	Secure disposal
--	-------	------------------------	-----------------

School Fund	Paper / electronic	Retention Period	Action at end
Cheque books	Paper	Current year + 6 years	Secure disposal
Paying in books	Paper	Current year + 6 years	Secure disposal
Ledger	Electronic	Current year + 6 years	Deletion
Invoices	Paper / electronic	Current year + 6 years	Secure disposal / deletion
Bank Statements	Paper	Current year + 6 years	Secure disposal

School Meals Management	Paper / electronic	Retention Period	Action at end
Free school meals registers	Paper / electronic	Current year + 6 years	Secure disposal / deletion
School Meal registers	Paper / electronic	Current year + 3 years	Secure disposal / deletion
School Meals summary sheets	Paper / electronic	Current years + 3 years	Secure disposal / deletion

Property Management	Paper / electronic	Retention Period	Action at end
Plans of property belonging to school	Paper / electronic	PERMANENT	N/A
Leases of property leased by or to school.	Paper	Expiry of lease + 6 years.	Secure disposal
Records relating to the letting of school premises	Paper / electronic	Current financial year + 6 years	Secure disposal / deletion

Maintenance	Paper / electronic	Retention Period	Action at end
All records relating to the maintenance of the school carried out by contractors	Paper	Current year + 6 years	Secure disposal
All records relating to the maintenance of the school carried out by school employees including maintenance log books	Paper	Current year + 6 years	Secure disposal

Pupil's Educational Record	Paper / electronic	Retention Period	Action at end
Pupil's educational record required by the education (Pupil Info) (England) Regulations 2005:			
Primary	Electronic	Retain whilst the child remains at the primary school.	Transfer to High School
Examination Results - Pupil copies			
Public	Electronic	Info should be added to pupil file	Transfer to High School
Internal	Electronic	Info should be added to pupil file	Deletion

<b>Pupil's Educational Record</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Child protection info held on pupil file	Paper / Electronic	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope & then retained for the same period of time as the pupil file.	Transfer to High School

<b>Attendance</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Attendance registers	Paper / Electronic	Every entry in the register must be preserved for a period of 3 years after the date on which the entry was made.	Secure disposal / deletion
Correspondence relating to authorised absence	Paper	Current academic year + 2 years	Secure disposal

<b>Special Educational Needs</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Special Educational needs files, reviews & individual education plans	Paper / Electronic	DOB of the child + 25 years.	Secure disposal / deletion
Statement maintained under section 234 of the Education Act 1990 & any amendments made to the statement.	Paper / Electronic	Date of birth of the pupil + 25 years.	Secure disposal / deletion
Advice & information provided to parents regarding educational needs.	Paper / Electronic	DOB of pupil + 25 years.	Secure disposal / deletion
Accessibility Strategy	Electronic	DOB of pupil + 25 years.	Deletion

<b>Statistics &amp; Management Information</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
SATS Records:			
Results	Electronic	Current year + 6 years	Deletion
Examination papers	Paper	1 year	Secure disposal
Value added & contextual data	Electronic	Current year + 6 years	Deletion
Self evaluation forms	Electronic	Current year + 6 years	Deletion

<b>Implementation of Curriculum</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Schemes of work	Electronic	Current year + 1 year	Deletion
Timetable	Electronic	Current year + 1 year	Deletion

Pupils' work	Paper	Where possible pupils' work should be returned to the pupil at the end of the academic year. If not, then current year + 1 year	Return to pupil
--------------	-------	---	-----------------

<b>Educational visits</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Parental consent forms for trips where there has been no major incident.	Paper	Conclusion of trip	Deletion
Parental consent forms for trips where there has been a major incident.	Paper	DOB of pupil involved + 25 years. The permission slips for all the pupils on the trip need to be retained to show that the rules have been followed for all pupils.	Deletion

<b>Family liaison officers &amp; home school liaison assistants</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
Reports for outside agencies - where the report has been included on the case file created by the outside agency.	Electronic	Whilst child is attending school, then destroy.	Deletion
Referral forms	Electronic	Whilst the child is attending school, then destroy	Deletion

<b>Local Authority</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
School Census Returns	Electronic	Current year + 5 years	Deletion

<b>Central Government</b>	<b>Paper / electronic</b>	<b>Retention Period</b>	<b>Action at end</b>
OFSTED reports & papers	Electronic	Life of the report then REVIEW	Deletion
Returns made to central government	Electronic	Current year + 6 years	Deletion