

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
<b>1 PUPILS</b>					
1.1	Pupil contact information	Contact information for pupil	Current year and review		Secure Disposal
1.2	Educational Records	Educational Records of Pupils	Follow pupil to next school (or DOB+25 years)		Electronical copies removed and destroyed
1.3	Attendance Registers	School Attendance: Departmental advice for maintained schools	Date of Register + 3 years		Electronical copies removed and destroyed
1.4	Absence correspondence, either authorised or unauthorised	Absence correspondence, either authorised or unauthorised	Each entry on the register to be kept for date of entry + 3 years Academic year + 2 years	School attendance: Department advice for maintained schools, Academies, independent schools and local authorities October 2014 Education Act 1996 Section 7	Secure Disposal
1.5	Special Educational Needs files, reviews, Education, Health and Care Plan, including advice or information provided to parents - EHCP plan is valid until pupil is 25 years old.	Special Educational Needs files, review and Individual Education Plans	Follow pupil to next school (or DOB+31 years)	Children and Family's Act 2014; Special Educational Needs and Disability Act 2001 Section 14	Passed onto Secondary School. Electronic records maybe stored for a period of 3 years
1.6	Correspondance relating to authorised absence and issues	Correspondance relating to authorised absence and issues	Date of absence + 2 years or follow pupil to next school		Secure Disposal
1.7	Child Protection Information held on pupil file	Child Protection Information held on pupil file	CPOMS Follow pupil to next school (or DOB+25 years)	Keeping children safe in education Statutory guidance for schools'. 'Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children'.	Passed onto Secondary School
1.8	Conduct/behaviour records	Conduct/behaviour records	Termination of relationship with student + 3 years if kept electronically		Review if incident or passed to secondary/alternative school
1.9	Nursery Contracts	Nursery Parental Agreement Contracts (Birth Certificates - circle on form, no copies taken)		Date of admission +1 year	Secure Disposal
1.1	Student work	Student Work	Return to student at end of academic year. If not possible, retain for current academic year + 1 year		Secure Disposal
<b>2 SCHOOL TRIPS and EXTRA-CURRICULAR ACTIVITIES</b>					
2.1	Parental permission slips for school trips	Parental permission slips for school trips - where there has been no major incident	One month where a paper record has been taken. Online payments remove electronic consent one month		Secure Disposal
2.2	Parental permission slips for school trips	Parental permission slips for school trips - where there has been a major incident	Conclusion of trip/investigation		Secure Disposal
2.3	Educational visit	Records created by schools to obtain approval to run an Educational Visit outside of the Classroom - Primary Schools	DOB of the pupil involved in the incident + 25 years	Limitation Act 1980	
<b>3 SPECIAL EDUCATIONAL NEEDS</b>					
3.1	SEN files, reviews and individual educational plans	SEN files, reviews and individual educational plans	CPOMS Follow pupil to next school (or DOB+25 years)	Limitation Act 1980	Passed onto Secondary School
3.2	EHC Plans	EHC Plans	CPOMS Follow pupil to next school (or DOB+25 years)	Section 37 The Children and Families Act 2014	Review and secure disposal
3.3	Advice and information to parents regarding educational needs	Advice and information to parents regarding educational needs	End of pupil relationship	Special Educational Needs and Disability Act 2001 Section 2	Secure Disposal unless subject to a legal hold
3.4	Accessibility Strategy	Accessibility Strategy	End of pupil relationship	Special Educational Needs and Disability Act 2001 Section 14	Secure Disposal unless subject to a legal hold
<b>4 MANAGEMENT OF GOVERNING BODY</b>					

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
4.1	Instruments of Government, including Articles of Association	Instruments of Government, including Articles of Association	Life of the School		Offer to local archives when school closes, otherwise destruction
4.2	Minutes	Minutes - Inspection Minutes plus Part B	Date of Meeting + 3 years		Secure Disposal
4.3	Action Plans	Action Plans from Meetings	Date of action plan + 3 years		Secure Disposal
4.4	Election records	Unsuccessful candidate election records for parents and staff governor appointments	Date of election + 6 months Decision to be recorded in minutes. Records to be kept for length of term, unless allegations where records should be retained for 25 years.		Secure Disposal
4.5	Election records for Chair and Vice-Chair	Election records for Chair and Vice-Chair	Once decision is minuted records to be destroyed		Secure Disposal
4.6	Scheme of delegation and terms of reference for committees	Scheme of delegation and terms of reference for committees	Until superceded		Secure Disposal
4.7	Meetings schedule	Meetings schedule	Current Year		Secure Disposal
4.8	Agendas and Minutes	Principal copies of Agendas and Minutes (to be stored together) FGB and Finance Meetings	10 Years		Offer to local archives when school closes, otherwise secure disposal
4.9	Reports	Reports presented at Governor's meeting, referred to in minutes	10 Years	Annual reports required by the DfE Education (Governors Annual Reports) (England)(Amendment) Regulations 2002.SI 2002 No 1171	
4.1	Additional copies of Agendas	Additional copies of Agendas	10 Years		
4.11	Attendance Register for full Governing Board Meetings	Attendance Register for full Governing Board Meetings	Held by Clerk East Riding of Yorkshire Council Last meeting + 6 years		Secure Disposal
4.12	Governor Monitoring visit records	Governor Monitoring visit records	Date of visit + 6 years		Secure Disposal
4.13	Records of complaints made to, and investigated by Governing Body or Headteacher	Records of complaints made to, and investigated by Governing Body or Headteacher	Major Complaints: current year + 6 years Negligence involved: current year + 15 years Child Protection or safeguarding issue current year + 40 years	Limitation Act 1980	Secure Disposal
4.14	Correspondence sent and received by Governing Body or Headteacher	Correspondence sent and received by Governing Body or Headteacher	Current year + 3 years		Secure Disposal
<b>5</b>	<b>GOVERNOR MANAGEMENT</b>				
5.1	Appointment records for Clerk to Governors/Co-opted Governors	Appointment records for co-opted Governors	Date of election + 6 months Decision to be recorded in minutes. Records to be kept for length of term, unless allegations where records should be retained for 25 years.		Secure Disposal
5.2	Appointment records for length served and evidence of appointment	Appointment records for length served and evidence of appointment	Until appointment ceases + 6 years		Secure Disposal
5.3	Governor declaration against disqualification criteria	Governor declaration against disqualification criteria	Until appointment ceases + 6 years		Secure Disposal
5.4	Register of Business Interests	Declaration forms	Until appointment ceases + 6 years		Secure Disposal
5.5	Governors Code of Conduct	Governors Code of Conduct	A copy of each version should be kept for life of the school		Destruction
5.6	Training records for Governors	Training records for Governors	Until appointment ceases + 6 years		Secure Disposal
5.7	Induction programme for new Governors	Induction programme for new governors (in school and LA)	Until appointment ceases + 6 years		Secure Disposal
5.8	DBS checks carried out on any member of the Governing Body	DBS checks carried out on any member of the Governing Body	Date of Check + 6 months		Secure Disposal
<b>6</b>	<b>HEADTEACHER and SENIOR MANAGEMENT TEAM</b>				

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
6.1	Senior Management Team meetings Minutes, and other minutes of internal admin bodies	Senior Management Team meetings Minutes, and other minutes of internal admin bodies	Date of Meeting + 3 years		Secure Disposal
6.2	Reports by Headteacher or Mangement Team	Reports by Headteacher or Mangement Team	Date of report + 3 years		Secure Disposal
6.3	Records created by Headteacher, or any other member of staff with administrative responsibilities which do not fall under any other category	Records created by Headteacher, or any other member of staff with administrative responsibilities which do not fall under any other category	Current year + 6 years		Secure Disposal
6.4	Correspondence created by Headteacher or any other member of staff with administrative responsibilities	Correspondence created by Headteacher or any other member of staff with administrative responsibilities	Current year + 3 years		Secure Disposal
6.5	Professional Development Plans	Staff Performance Management	Held on personnel records - if not length of employment + 6 years		Secure Disposal
6.6	School Development Plans	Development/Action Plans	Current plan + 3 years		Secure Disposal
<b>7</b>	<b>OPERATIONAL ADMINISTRATION</b>				
7.1	General files, not relating to any other category	General files, not relating to any other category	Current Year + 5 Years		Secure Disposal
7.2	School Circulars and any other related records	School Circulars and any other related records	Current year + 1 year		Secure Disposal
7.3	School Privacy noptice communicated to parents	School Privacy noptice communicated to parents	Until suspended + 6 years		Secure Disposal
7.4	Consent relating to GDPR compliance ie consent for mailings	Consent relating to GDPR compliance ie consent for mailings	Until pupil leaves		Secure Disposal
7.5	Newsletters etc	Newsletters etc	Current year + 1 year		Secure Disposal
7.6	Visitor management system ie signing in sheets	Visitor management system ie signing in sheets	Last entry + 6 years		Secure Disposal
<b>8</b>	<b>RECRUITMENT</b>				
8.1	Appointment records for Headteacher post	All records leading up to the appointment of a new Headteacher	Unsuccessful applications: Date of appointment + 6 months Successful: Add to personnel file for length of employment + 6 years Negligence or abuse claims: minimum 15 years		Secure Disposal
8.2	Staff applications	Unsuccessful candidate for appointments of staff/governor position	Unsuccessful applications: Date of appointment + 6 months Successful: Add to personnel file for length of employment + 6 years Negligence or abuse claims: minimum 15 years		Secure Disposal
8.3	Interview notes and records	Interview notes and recruitment records	Date of interview + 6 months		Secure Disposal
8.4	Pre-employment - DBS	Pre-employment checks and vetting of successful candidates, DBS checks and Childcare Disqualification Forms	Length of employment + 6 years	DBS Update Service Employer Guide September 2018; Keeping Children Safe in Education, 2021 (Statutory Guidance from DoE) Sections 73, 74 An Employer's Guide to Right to Work Checks (Home Office, Dec 2021)	Secure Disposal
8.5	Pre-employment - Right to Work	Pre-employment checks and vetting of successful candidates, Evidence to work in UK	Length of employment + 2 years	DBS Update Service Employer Guide September 2018; Keeping Children Safe in Education, 2021 (Statutory Guidance from DoE) Sections 73, 74 An Employer's Guide to Right to Work Checks (Home Office, Dec 2021)	Secure Dsposal

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
8.6	DBS Disclosure	Portable Enhanced DBS disclosure proof of identity	Retained on personnel file		Secure Disposal
<b>9 OPERATIONAL STAFF MANAGEMENT</b>					
9.1	Personnel	Staff Personnel Files	Length of Appointment + 6 years If required by Independent Inquiry into Child Sexual Abuse (IICSA), until enquiries are complete	Limitation Act 1980 (Section 2)	Secure Disposal
9.2	Personal Development	Appraisal/assessment records	Current year + 6 years		Secure Disposal
9.2	Sickness Pay	Sickness absence monitoring, for the purpose of statutory sick pay	If sick pay is not paid: current year + 3 years Paid: current year + 6 years		Secure Disposal
9.4	Training	Staff training for continual professional development	Length of time required by professional body		Secure Disposal
9.5	Training	Staff training - not relating to children ie First Aid	on personnel records - if not length of employment + 6 years		Secure Disposal
9.6	Training	Staff training - relating to children ie Safeguarding	Date of training + 40 years		Secure Disposal
9.7	Additional hours	Timesheets	Current year + 6 years		Secure Disposal
<b>10 DISCIPLINARY and GRIEVANCE PROCESSES</b>					
10.1	Child Protection Allocation	Records relating to any allegation of a child protection nature against staff member	Malicious allegations should be removed from personnel files. Otherwise until staff members normal retirement age + 10 years. If part of Independent Inquiry into Child Sexual Abuse (IICSA) enquiries then until the enquiries are complete.	Keeping children safe in education statutory guidance for schools 2021. "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2020"	Secure Disposal
10.2	Disciplinary proceedings	Disciplinary proceedings	In line with Council policy, length of employment + 6 years		Secure Disposal
10.3	Accident/Injuries	Records relating to accident/injury at work	Date of incident + 6 years or if kept on staff file then refer to personal file. In the case of serious accidents a further retention period will need to be applied.		Secure Disposal
<b>11 FINANCE</b>					
11.1	Annual accounts	Masterpiece Budget Records relating to creation and management of budgets	Life of the budget + 6 years		Secure Disposal
11.2	Payments (Contracts/services etc)	Orders/invoices, receipts, requisitions, delivery notices	Current year + 6 years		Secure Disposal
11.3	Banking	Records for collection and banking of monies into budget/school fund	Current year + 6 years		Secure Disposal
11.4	Purchase Card	Credit and Virtual Card	Current year + 6 years		Secure Disposal
11.5	Insurance	Public Liability/trips etc	Current year + 6 years		Secure Disposal
11.6	Debt	Records for the identification and collection of debts	Current year + 6 years		Secure Disposal
<b>12 SCHOOL FUND</b>					
12.1	Bank books	School fund cheque book/paying in book/Spreadsheet - ledger/invoices & receipts/statements	Current year + 6 years		Secure Disposal
12.2	Bank Statements	Statements balanced to ledger account and signed by Headteacher	Current year + 6 years		Secure Disposal
<b>13 CONTRACT MANAGEMENT</b>					
13.1	Records for the management of contracts	Contracts under signature	Last payment on the contract + 6 years	Limitation Act 1990	Secure Disposal
13.2	Monitoring contracts	Records for the monitoring of contracts SEAL - A contract under seal, or a deed, is a written document that, when "sealed", is distinguishable from a contract. A deed is a formal document that gives the clear indication that a person or entity gives its most sincere promise that they will fulfil contractual obligations.	Life of contract + 6 years or 12 years - dependant if under seal/signature		Secure Disposal
13.3	SLA's	Service Level Agreements (with LA).	Current year + 6 years		Secure Disposal

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<b>14 SCHOOL MEALS MANAGEMENT</b>					
14.1	Free school meals registers	Free school meal registers, which is used for the basis for funding (held electronically)	Current year + 6 years		Secure Disposal
14.2	School Meal registers	Meal registers and summary sheets	Paper copies destroyed - electronically current year + 3 years		Secure Disposal
<b>15 PAYROLL</b>					
15.1	Maternity Pay	Maternity Pay Records School - Masterpiece Payroll - Local Authority	Current year + 6 years (School) Current year + 3 years (LA)	Taxes Management Act 1970 Income and Corporation Taxes 1998	Secure Disposal
15.2	Absence Record	Absence Record (sickness Declaration forms/Sicknotes) - iTrent	Current + 3 years	Taxes Management Act 1970 Income and Corporation Taxes 1998	Secure Disposal
15.3	Car Mileage	Car mileage (Training/Casual)	Current + 3 years		Secure Disposal
15.4	Insurance	Sickness Insurance (LA) reported on iTrent. Papercopy of Insurance kept with budget	Current year + 6 years		Secure Disposal
15.5	Personal Bank Details	Held in personnel file with eform and electronically on iTrent/SIMS	Current year + 6 years		Secure Disposal
<b>16 HEALTH &amp; SAFETY</b>					
16.1	Health & Safety (Policy)	Policy and Statement of Intent	Life of policy + 3 years		Secure Disposal
16.2	Health & Safety (RA/Personal Evacuation Plans)	Risk Assessments	Life of risk assessment + 3 years. If accident occurs a copy of the risk assessment should be stored with the report.		Secure Disposal
16.3	Accident reports	Accident books + reports to the LA	Adults - date of incident + 6 years held in personnel file Children - DOB + 25 years RIDDOR reportable accidents - emailed to LA, copy retained by the school	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 Social Security (Claims and Payments) Regulations 1979. SI 1979 No 628 Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628 Social Security Administration Act 1992 Section 8. Social Security (Claims and Payments) Amendment (No 30) Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically Riddor - Reporting of injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12(2)	Secure Disposal

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
16.4	COSHH	Control of Substance Hazardous to Health	Cleaning - SLA with LA Data Sheets held in the office for all other products. Updated as required	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)	Secure Disposal
16.5	Asbestos	Monitoring of asbestos contact	Date of incident + 40 years	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Secure Disposal
16.6	Fire	Log books	Current year + 3 years		Secure Disposal
16.7	Health & Safety File	Include current state of building, including all alterations	To be past onto new owner or transfer of the property Copy of documents held with LA		Secure Disposal
16.8	CCTV		Store images for 14 days but no longer than 30 days. Specific images maybe stored for longer if they are required for legitimate purpose		Secure Disposal
<b>17</b>	<b>RISK MANAGEMENT and INSURANCE</b>				
17.1	Employers Liability Insurance	Employers Liability Insurance	Life of school + 40 years (held electronically, copies held with LA)		Secure Disposal
<b>18</b>	<b>ASSET MANAGEMENT</b>				
18.1	Inventory	Furniture and equipment	Current year + 6 years		Secure Disposal
18.2	Burglary, Theft and Vandalism Report Forms	Insurance forms/police reports	Current year + 6 years		Secure Disposal
<b>19</b>	<b>PROPERTY</b>				
19.1	Records	Maintenance and Contractor records Records relating to the Lettings of school premises Maintenance log books Contractor reports	Current year + 6 years		Secure Disposal
<b>20</b>	<b>DATA PROTECTION</b>				

Ref.	Title	Description	Retention Period	Statutory Provisions	Action at end of record life
20.1	Subject Access Request	Subject Access Requests	If responded: current year + 2 years then review (May keep longer depending on request complexity/if supervisory authority involved)		Review and Secure Disposal
20.2	Freedom of Information Requests	Freedom of Information Requests	Current academic year + 2 years		Review and Secure Disposal
20.3	Data Sharing Agreements	Data Sharing Agreements	Until superseded		Secure Disposal
<b>21</b>	<b>ATTENDANCE and WELFARE</b>				
21.1	Outside Agencies Report	Reports for outside agencies - where the report has been included on the case file created by the outside agency	Termination of student relationship		Secure Disposal
21.2	Referral forms	Referral forms	While the referral is current		Secure Disposal
21.3	Data Sheets	Contact Data Sheets	Current year then review, if contact is no longer active then destroy		Secure Disposal
<b>23</b>	<b>ADMISSIONS PROCESS</b>				
23.1	School Admissions Policy	Records relating to creation and implementation of school admissions policy	Life of policy + 3 years	Statutory Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, school adjudicators and admission appeals panels December 2014	Secure Disposal
23.2	Successful admissions	Successful application (copies of paperwork held with the LA)	Date of admission + 1 year	Statutory Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, school adjudicators and admission appeals panels December 2014	Secure Disposal
23.3	Unsuccessful admissions and appeals	Unsuccessful application (copies of paperwork held with the LA)	Resolution of case + 1 year	Statutory Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, school adjudicators and admission appeals panels December 2014	Secure Disposal
<b>24</b>	<b>STATISTICS AND MANAGEMENT INFORMATION</b>				
24.1	Returns	Curriculum Returns	Current year + 3 years		Secure Disposal
24.2	Exam Papers	SAT's Records	Results to be recorded on pupil's education file. To be kept for current year + 6 years. SAT papers to be kept if open to an appeal.		Secure Disposal
24.3	Published Admission Number	PAN Reports	Current year + 6 years		Secure Disposal
24.4	Value Added	Value Added Contextual Data	Current year + 6 years		Secure Disposal
24.5	Self-Evaluation forms, internal and external moderation	Self-Evaluation forms, internal and external moderation	External: Until superseded		Secure Disposal
24.6	Census	Census	Current year + 3 years		Secure Disposal