

Retention Schedule
(Draft)

Basic file description	Who is responsible for managing this data?	Retention Period	Destruction Method	System	Additional Notes
Pupil Management					
Admissions and Attendance					
Admission Registers	School Business Manager	Permanent	N/A	RM Integris	Held on RM history
Records relating to the admissions process – if the admission is successful	Headteacher and School Business Manager	Admission + 1 year	Transfer to Secondary	RM Integris	Held on RM history
Admissions – if the appeal is unsuccessful	Headteacher and Governing Board Panel	Resolution of case + 1 year	On Site Shredding and data cleansing	Email, School iCloud (Sharepoint SLT area),	Governing Board Panel Meeting Notes and Communications both electronic and hard copy.
Admissions – Secondary Schools – Casual	Derbyshire County Council Admissions	Current year + 1 year	N/A	School Admission Module and RM Integris	
Exclusions & Suspension	Headteacher and Governing Board Panel	DOB of the pupil + 25 years	Transfer to Secondary, data cleansing and inhouse shredding	School iCloud (Sharepoint SLT area), Hard copy	Held on RM history
Pupil Educational Record					
Proofs of address supplied by parents as part of the admissions process	School Business Manager and School Office Staff	Current year + 1 year	On Site Shredding	Photocopies held in pupil files	
Attendance registers	School Business Manager and School Office Staff	Date of register + 3 years	On Site Shredding	RM Integris and hard copies	
Medical and allergy information (including IHCP & PEEP)	School Business Manager and School Office Staff	DOB of pupil + 25 years then review unless legal action is pending. If so, it may be appropriate to add an additional retention period.	Transfer to Secondary and data cleansing	RM Integris and hard copies	
Letters authorising absence	Attendance Officer and Headteacher	Date of absence + 2 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint Attendance area), Hard copy	
Pupil Files and/or record cards - Primary	School Business Manager and School Office Staff	Retain for the time which the pupil remains at the Primary School Transfer to the Secondary School (or other Primary School) when the child leaves the school	Transfer to Secondary	RM Integris and Pupil Files	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.
Pupil Files and/or record cards - Secondary	N/A	DOB of the pupil + 25 years	N/A	N/A	See above
Examination results - Public	Headteacher	Year of examinations + 6 years	Transfer to Secondary	RM Integris	Any certificates left unclaimed should be returned to the appropriate Examination Board. N/A for Primary.

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Examination results - Internal examination results	Headteacher and SLT	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	Transfer to Secondary	RM Integris and Pupil Files	
Any other records created in the course of contact with pupils	Headteacher and School Business Manager	Current year + 3 years then review	Transfer to Secondary	School iCloud (Sharepoint SLT), CPOMS, Hard copy	
Images held of pupils together with any consents and permissions to publish	School Business Manager and School Office Staff	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	Transfer to Secondary	RM Integris and hard copies	
Special Educational Needs					
Special Educational Needs files, reviews and Individual Education Plans	SENCO	DOB of the pupil + 25 years	Transfer to Secondary and data cleansing	RM Integris and CPOMS and School iCloud (Sharepoint)	
Statement of Special Educational Needs or EHCP	SENCO	DOB + 30 years Unless legal action is pending	Transfer to Secondary and data cleansing	School iCloud (Sharepoint), CPOMS, Hard copy SENCO Cabinet	
Proposed EHCP or Draft Plan	SENCO	DOB + 30 years Unless legal action is pending	Transfer to Secondary	School iCloud (Sharepoint), CPOMS, Hard copy SENCO Cabinet	
Advice and information to parents regarding educational needs	SENCO	Closure + 12 years Unless legal action is pending	Transfer to Secondary and data cleansing	School iCloud (Sharepoint), CPOMS, Hard copy SENCO Cabinet	
Pupil SEN Files	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.	Transfer to Secondary and data cleansing	School iCloud (Sharepoint), CPOMS, Hard copy SENCO Cabinet	
School Trips and Extra Curricular Activities					
Educational Visits outside the Classroom					
Day Trips					
Parental permission slips for school trips – where there has been no major incident	School Business Manager, School Office Staff and EVC	Conclusion of the trip	On Site Shredding and data cleansing	Microsoft Forms, Parent Pay and Hard Copy School Office Pupil File	

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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.	EVC, Headteacher and Derbyshire County Council Health and Safety Section	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	Transfer to Secondary	Evolve and archive	
Residential Trips					
All records relating to the organization of school residential trips	Headteacher, EVC,	Date of the residential visit + a minimum of 6 years then review	Evolve - electronic data cleansing	Evolve	
Walking Bus					
Walking Bus registers	N/A	Date of register + 3 years	N/A	N/A	This takes into account the fact that if there is an incident requiring an accident report the register will be submitted with the accident report and kept for the period of time required for accident reporting
Management of School - Safeguarding					
Adults					
Records of allegations about workers who have been investigated and found to be without substance	Headteacher	These records should not normally be retained once an investigation has been completed.	On Site Shredding and data cleansing	School iCloud (Headteacher Area)	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	Headteacher	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	Site Storage and data cleansing	School iCloud (Sharepoint Headteacher Area)	
Children					
Child abuse records (IISCA)	Headteacher	retained for 75 years	Transfer to Secondary	CPOMS	Any record that relate or could relate to sexual abuse
Local Authority					
Secondary transfer sheets (Primary)	School Business Manager and Headteacher	Current year + 2 years	Electronic data cleansing and on site shredding	School iCloud (Sharepoint) Excel Spreadsheet and hard copies	
School Management - Teaching and Curriculum					
Senior Management Team					
Minutes of the Senior Management Team and other internal administrative bodies	Headteacher	Date of meeting + 5 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area)	

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Reports made by the Head Teacher or the management team	Headteacher	Date of report + 3 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area)	
Records created by Head Teachers, Deputy Head Teachers, Heads of Year and other members of staff with administrative responsibilities	Headteacher	Closure of file + 6 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area)	
Correspondence created by Head Teachers, Deputy Head Teachers, Heads of Year and other members of staff with administrative responsibilities	Headteacher	Date of correspondence + 3 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area)	
Professional development plans	Headteacher	Closure + 6 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area)	
Curriculum Management					
SATS records including examination results. Exam papers should only be retained if they are required to evidence the results	Headteacher	Current year + 6 years	Transfer to Secondary	RM Integris and School iCloud (Sharepoint)	
School Management - HR, Administration, Finance, Premises and Health & Safety					
Personnel Management					
Staff Personal files	School Business Manager and Headteacher	Termination + 6 years	On Site Shredding and electronic data cleansing	Hard copy School Office/Headteacher Office (restricted)	this includes online recruitment checks
Interview notes and recruitment records	Headteacher	Date of interview + 6 months	On Site Shredding	Hard copy School Office/Headteacher Office (restricted)	this includes online recruitment checks
Pre-employment vetting information (including DBS checks).	School Business Manager	Date of check + 6 months	On Site Shredding and data cleansing	Hard copy photocopies, Excel Spreadsheet (School iCloud, restricted access Sharepoint)	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	School Business Manager	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.	On Site Shredding and data cleansing	Hard copy photocopies, Excel Spreadsheet (School iCloud, restricted access Sharepoint)	

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Online presence pre-employment check	Headteacher	Termination of employment + 2 years	On Site Shredding	Hard copy photocopies, Excel Spreadsheet (School iCloud, restricted access Sharepoint)	Please note this will not be conducted for every employee.
Right to Work in the UK checks	School Business Manager	Termination of employment + 2 years	On Site Shredding	Hard copy photocopies, Excel Spreadsheet (School iCloud, restricted access Sharepoint)	
Disciplinary proceedings: case not found	Headteacher	Take advice from HR Team if the proceedings were child protection related otherwise destroy immediately at the conclusion of the case	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area), Hard copy Headteacher's Office	
Disciplinary proceedings: written warnings	Headteacher	The duration of the warning	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area), Hard copy Headteacher's Office	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	Headteacher	Current year + 5 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area), Hard copy Headteacher's Office	
Low level concerns	Headteacher	Dependant on the nature of the incident - minimum 24 months of the record	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area), Hard copy Headteacher's Office	
Images held of members of staff together with any consents and permissions to publish	Headteacher and School Business Manager	Specify in Privacy Notice how photos of members of staff will be used and duration of use.	When no longer in use. On Site Shredding and electronic data cleansing.	RM Integris, Hard Copy Personnel File	
Staff personal information - e.g. medical appointments	Headteacher and School Business Manager	Review in line with HR guidance and school policy	Retain on Personnel File and On Site Shredding in line with Staff File Disposal	Google Calendar and Hard Copy Personnel Files	
Health and Safety					

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Accessibility Plans	Headteacher	Current year + 6 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint SLT area), Hard copy Headteacher's Office	
Records relating to accident/injury at work	Headteacher and School Business Manager	Date of incident + 12 years	On Site Shredding and electronic data cleansing	Hard copy School Office/Headteacher Office (restricted), Derbyshire County Council Health and Safety Department	
Accident Reporting – Children	School Business Manager and Headteacher	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.	On Site Storage and Data Shredding	Hard copy School Office/Headteacher Office (restricted), Derbyshire County Council Health and Safety Department	
Accident Reporting – Adults	School Business Manager	Date of the accident + 4 years where the injured person is an adult at the time of the accident;	On Site Shredding and electronic data cleansing	Hard copy School Office/Headteacher Office (restricted), Derbyshire County Council Health and Safety Department	
Incident reports	School Business Manager	Current year + 20 years	On Site Shredding and electronic data cleansing	Hard Copy Storage in School Archive	
Derbyshire County Council					
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Payroll	Current year + 6 years	Derbyshire County Council	SAP	
Maternity pay records	Payroll	Current year + 3yrs	Derbyshire County Council	SAP	
Timesheets, sick pay	School Business Manager	Current year + 6 years	On Site Shredding and electronic data cleansing	SAP and Hard Copy School Office	
Financial Records					
Debtors' Records	School Business Manager and DCC Accounts Department	Current year + 6 years	On Site Shredding and electronic data cleansing	SAP	
Applications for free school meals, travel, uniforms etc	School Business Manager, DCC FSM Section	Whilst child is at school	Transfer to Secondary	Derbyshire County Council Online Application, School Admission Module	
Other financial records	School Business Manager	Current year + 6 years	On Site Shredding and electronic data cleansing	SAP and Hard Copy School Archive	

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Student grant applications	N/A	Current year + 3 years	N/A		
School Meals					
Dinner Register	School Business Manager and School Office Staff	Current year + 3 years	On Site Shredding	RM Integris, Parent Pay and Hard Copy School Archive	
Free school meals registers	School Business Manager and School Office Staff	Current year + 6 years	On Site Shredding	RM Integris, Parent Pay and Hard Copy School Archive	
Visitors book	School Business Manager and School Office Staff	Current year + 2 years	Electronic data cleansing	Sign In App	
Images held of pupils together with any consents and permissions to publish	School Business Manager and School Office Staff	Part of pupil record. Duration of pupil's attendance at school, if SEN or safeguarding duration of that whole record.	Transfer to Secondary	RM Integris and Hard Copies Pupil Files	
Records relating to the management of PTA/Old Pupils Associations	N/A	Current year + 6 years	N/A	N/A	
Records relating to the management of data subject access requests	School Business Manager and DPO	Current year + 3 years	On Site Shredding and electronic data cleansing	GoGDPR Portal, School iCloud (Sharepoint) and Hard Copy School Office	
Records relating to the management of freedom of information requests	School Business Manager and DPO	Current year + 3 years	On Site Shredding and electronic data cleansing	GoGDPR Portal, School iCloud (Sharepoint) and Hard Copy School Office	
Governing Board					
Governance Documents					
Records relating to the appointment of foundation directors or governors	Clerk to Governors	Permanent	N/A	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Records relating to the election of parent governors	Clerk to Governors	Date of election + 6 months	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Records relating to the election of chair and vice chair	Clerk to Governors	Once the decision has been recorded in the minutes, the records relating to the election can be destroyed	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Trust and LGB Minutes - Principal set (signed)	Clerk to Governors	Permanent	N/A	Hard Copy School Office Governor Folder	

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Reports made to the Trust/LGB Meeting which are referred to in the minutes	Clerk to Governors	Permanent	N/A	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Register of attendance at Trust and LGB meetings	Clerk to Governors	Date of last meeting in the book + 6 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Minutes - Inspection copies	Clerk to Governors	Date of meeting + 3 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Records relating to Governor Monitoring Visits	Clerk to Governors	Date of the visit + 3 years	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Records relating to complaints made to and investigated by the Governing Body (ie stage 3 complaints)	Clerk to Governors	Date of resolution of complaint + 6 years then review for further retention in the case of contentious disputes	On Site Shredding and electronic data cleansing	School iCloud (Sharepoint) and Hard Copy Governor Folder	
Correspondence sent and received by the Governing Body	Clerk to Governors	Current year + 6 years	On Site Shredding and electronic data cleansing	Email, Hard Copy Governor Folder and School iCloud (Sharepoint)	
Appointment and termination of Trustees/Directors/Governors	Clerk to Governors and DCC Governor Support	Maintain all records from date of termination + 6 years	On Site Shredding and electronic data cleansing	Email, School iCloud (Sharepoint), School Office Governor Folder	
Records relating to the appointment of a clerk to the Trust/Governing Body	DCC Governor Support and Headteacher	Date appointment as clerk ceases + 6 years	On Site Shredding and electronic data cleansing	Hard copy School Office Gover Folder	
Records relating to the terms of office of serving directors/governors including evidence of appointment	Clerk to Governors	PERMANENT	N/A	Hard copy School Office Gover Folder, School iCloud (Sharepoint)	
Records relating to Director/Governor Declaration against disqualification criteria	Clerk to Governors	Until the Governor steps down	On Site Shredding and electronic data cleansing	Hard copy School Office Gover Folder	
Register of Business Interests	Clerk to Governors	PERMANENT	N/A	Hard copy School Office Gover Folder	
Director/Governors Code of Conduct signed	Clerk to Governors	This is expected to be a dynamic document, one copy of each version should be kept permanently	N/A	Hard copy School Office Gover Folder	

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Records relating to the training required and received by Director/ Governors	Clerk to Governors, Full Governing Board	Until the Governor steps down	On Site Shredding and electronic data cleansing	Email, School iCloud (Sharepoint),	
Records relating to the induction programme for new directors/governors	Clerk to Governors, Full Governing Board	Until the Governor steps down	On Site Shredding and electronic data cleansing	Email, School iCloud (Sharepoint),	
Records relating to DBS checks carried out on clerk, directors and members of the governing body (certificate number to be retained)	School Business Manager	Date of DBS check + 6 months	On Site Shredding and electronic data cleansing	Excel Spreadsheet School iCloud (Sharepoint)	