

Data Retention Policy

This policy is effective for all schools within The Mead Educational Trust, the Teaching School, the SCITT and all other activities under the control of the Trust and reporting to the Trust Board.

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Ratified by	Executive Team
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Revision History:

Version	Date	Author	Summary of Changes:
3.1	Sept 2026	CJO	Section 25: included telephone recordings
3.0	July 2025	CBR/CJO	Retention tables updated Addition of: Section 2 Scope and Application; 4.3;
2.0	April 2022	EMA/CBR	Updated policy based on the latest version of the Information Management Toolkit for schools
1.0	April 2018	CBR	New policy

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1 Purpose

- 1.1 This Policy sets out the measures adopted by The Mead Educational Trust (referred to as “the Trust”, “we” or “our”) in respect of the retention and disposal of records that contain personal data or other confidential information.
- 1.2 The Policy details the procedures for the retention and disposal of information to ensure that we carry this out consistently and that we fully document any actions taken. Unless otherwise specified, the retention schedule refers to both hard and soft copy documents.

Associated policies:

- TMET Data Protection Policy
- TMET Freedom of Information Policy

2 Scope and application

- 2.1 This Policy provides a Trust-wide framework for the retention and disposal of records in line with recognised best practice and the Information & Records Management Society (IRMS) toolkit.
- 2.2 The inclusion of a record type within the retention schedule does not require schools to create that record. Schools and services are not expected to generate records where there is no statutory, operational, safeguarding, health and safety, financial, or governance requirement to do so.
- 2.3 Where a record does exist, whether created at Trust or school level, it must be retained, reviewed, and securely disposed of in accordance with the retention schedule set out in this Policy.
- 2.4 Retention periods apply only for as long as records exist. The absence of a record does not, of itself, indicate non-compliance where there has been no requirement for that record to be created.

3 Review

Review is the examination of closed records to determine whether they should be destroyed, retained for a further period or transferred to an archive for permanent preservation.

4 How long should we keep our records

- 4.1 Records should be kept for as long as they are needed to meet the operational needs of the Trust, together with legal and regulatory requirements. We have assessed our records to:

- 4.1.1 Determine their value as a source of information about the Trust, its operations, relationships and environment.
 - 4.1.2 Assess their importance as evidence of business activities and decisions.
 - 4.1.3 Establish whether there are any legal or regulatory retention requirements (including: Public Records Act (1958), the Freedom of Information Act (2000), the Limitation Act (1980), the Data Protection Act (2018).
- 4.2 Where records are likely to have a historical value, or are worthy of permanent preservation, we may choose to archive them at the end of any statutory retention period.
- 4.3 The Trust does not require records to be created solely to meet retention periods. However, where records are created and held, they will be retained only for as long as necessary and managed in accordance with this retention schedule.

5 Disposal schedule

- 5.1 A disposal schedule is a key document in the management of records and information. It is a list of series or collections of records for which predetermined periods of retention have been agreed between the Trust and its Data Protection Officer (DPO).
- 5.2 The Disposal Schedule for the Trust appears as Section 8 of this Policy.
- 5.3 Records on disposal schedules will fall into three main categories:
 - 5.3.1 **Destroy after an agreed period** – where the useful life of a series or collection of records can be easily predetermined (for example, destroy after 3 years; destroy 2 years after the end of the financial year).
 - 5.3.2 **Automatically select for permanent preservation** – where certain groups of records can be readily defined as worthy of permanent preservation and transferred to an archive.
 - 5.3.3 **Review** – unknown at present but subject to review in a defined period of time see 2 above.
- 5.4 Records can be destroyed in the following ways:
 - 5.4.1 Non-sensitive information – can be placed in a normal rubbish bin.
 - 5.4.2 Confidential information – crosscut shredded and pulped or burnt.
 - 5.4.3 Highly Confidential information – crosscut shredded and pulped or burnt

- 5.4.4 Electronic equipment containing information - destroyed using appropriate technology and individual folders will be permanently deleted from the system.
- 5.5 Destruction of electronic records should render them non-recoverable even using forensic data recovery techniques.
- 5.6 The Disposal Schedule will be kept up to date in that new categories of data are added.

6 Data sharing and disposal

- 6.1 Where we share information with other bodies, we will ensure that they have adequate procedures for data retention and disposal to ensure that the information is managed in accordance with the Trust's policies, relevant legislation and regulatory guidance.
- 6.2 Where relevant to do so we will carry out a data protection impact assessment and update our privacy notices to reflect data sharing.

7 Record-Keeping

- 7.1 It is not necessary to document the disposal of records when that has been done in line with the records retention schedule. Documents disposed of outside the schedule, either by being disposed of earlier or kept for longer than listed, will need to be recorded for audit purposes.
- 7.2 This will provide an audit trail for any inspections conducted by the Information Commissioner's Office and will aid in addressing Freedom of Information requests, where we no longer hold the material.

8 Monitoring

- 8.1 Responsibility for monitoring the disposal policy rests with the Trust's Data Protection Lead. The policy will be reviewed as and when necessary and at least once every 3 years.

9 Records retention schedule

10 Contracts

Contracts						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Contracts	All records relating to the management of contracts under seal	No	Last payment on the contract + 12 years or end of contract + 12 years, whichever is the longer	Limitation Act 1980	SECURE DISPOSAL	
Contracts	All records relating to the management of contracts under signature	No	Last payment on the contract + 6 years or end of contract + 6 years whichever is the longer	Limitation Act 1981	SECURE DISPOSAL	
Contracts	Records relating to the management of contracts with external providers	No	End of contract + 6 years or date of last payment on contract + 6 years whichever is the longer		SECURE DISPOSAL	
Contracts	Records relating to the monitoring of contracts	No	End of the contract or until the final payment has been made whichever is the longer		SECURE DISPOSAL	
Contracts	All records relating to the maintenance of the school carried out by contractors	No	Current year + 6 years. This may vary on the type of maintenance. Records relating to rewiring, major alterations etc must be retained in the health and safety file whilst the building belongs to the school and must be passed onto any new owners if the building is leased or sold.		SECURE DISPOSAL	
Contracts	All records relating to the maintenance of the school carried out by school employees, including	No	Life of equipment + 6 years. Alterations to wiring and major modifications must be entered in to the health and safety file		SECURE DISPOSAL	

Contracts						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
	maintenance log books					
Contracts	Records relating to the management of software licences	No	Date licence expires + 6 years		SECURE DISPOSAL	

11 Education Management

Education management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Management Information	Published Admission Number (PAN) reports	Yes	Current year + 6 years		SECURE DISPOSAL	
Management Information	Curriculum returns	No	Current year + 3 years		SECURE DISPOSAL	
Management Information	Self-evaluation forms	Yes	Current year + 6 years		SECURE DISPOSAL	
Management Information	Self Evaluation Forms - External moderation	Yes	Until superseded		SECURE DISPOSAL	
Management Information	Self Evaluation Forms - Internal moderation	Yes	Academic year plus one academic year		SECURE DISPOSAL	
Management Information	Value added and contextual data	Yes	Current year + 6 years		SECURE DISPOSAL	

Education management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Policies and Frameworks	Complaints Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Data Protection Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Freedom of Information Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Information Security Breach Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Special Educational Needs Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Equality Information and Objectives (public sector equality duty). Statement for publication	No	Life of statement or date statement superseded + 3 years		SECURE DISPOSAL	
Policies and Frameworks	Risk and Control Framework	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	
Policies and Frameworks	Rules and Bylaws	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	

Education management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Strategy	Strategic Review	No	Life of the review or until review superseded + 3 years. If major changes are made to the review then an archive copy of previous review should be retained		SECURE DISPOSAL	
Strategy	Strategic Plan [also known as School Development Plans]	No	Life of the review or until review superseded + 3 years. If major changes are made to the review then an archive copy of previous review should be retained		SECURE DISPOSAL	
Strategy	Accessibility Plan	No	Life of the review or until review superseded + 3 years. If major changes are made to the review then an archive copy of previous review should be retained	Equality Act 2010	SECURE DISPOSAL	

12 Examinations

Examinations						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Examinations	SATs records Examination papers	Yes	The examination papers should be kept until any appeals/validation process is complete		SECURE DISPOSAL	
Examinations	SATs records Results	Yes	The SATS results should be recorded on the pupils educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. These could be kept for current year + 6 years to allow suitable comparison		SECURE DISPOSAL	
Examinations	Examination Results Pupil Copies: Public	Yes	This information should be added to the pupil file		Schools should follow the instructions of the Examination Board about disposing of	

Examinations						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
					uncollected certificates	
Examinations	Examination results pupil copies: Internal	Yes	This information should be added to the pupil file			
Examinations	Examination results (schools copy)	Yes	Current year + 6 years		SECURE DISPOSAL	
Examinations	Management of examination registrations	Yes	The examination board will usually mandate how long these records need to be retained			

13 Extra Curriculum and Miscellaneous Activities

Extra Curriculum and Miscellaneous Activities						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Extra Curriculum and Miscellaneous Activities	Records created by schools in order to obtain approval to run an educational visit outside the classroom - Primary schools	No	Date of Visit + 15 years	Limitation Act 1980	SECURE DISPOSAL	
Extra Curriculum and Miscellaneous Activities	Records created by schools in order to obtain approval to run an educational visit outside the classroom - Secondary schools	No	Date of visit + 15 years	Limitation Act 1980	SECURE DISPOSAL	

Extra Curriculum and Miscellaneous Activities						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Extra Curriculum and Miscellaneous Activities	Parental consent forms for school trips where there has been no major incident	Yes	Until pupil leaves school.		SECURE DISPOSAL	One-off or blanket consent: The Department for Education (DfE) has prepared a one-off consent form to be signed by the parent on enrolment of their child in a school. This form is intended to cover all types of visits and activities where parental consent is required. The form is available on the DfE website for establishments to adopt and adapt, as appropriate, at https://www.gov.uk/government/publications/consent-for-school-trips-and-other-off-site-activities . A similar form could be used for other establishments, such as Early Years Foundation Stage (EYFS) providers and youth groups, or at the start of programmes for young people.
Extra Curriculum and Miscellaneous Activities	Parental permission slips for school trips where there has been a major incident	Yes	Date of birth of the pupil involved in the incident + 25 years or 15 years after the incident whichever is the longer. The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	Limitation Act 1980	SECURE DISPOSAL	
Extra Curriculum and Miscellaneous Activities	Records relating to residential trips	Yes	Date of birth of youngest pupil involved + 25 years or if there is a major incident then date of incident + 15 years whichever is the longer	Limitation Act 1980	SECURE DISPOSAL	

14 Finance

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Funding	Funding Agreement with Secretary of State and supplemental funding agreements [Where there is multi-Academy governance.]	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
Funding	Funding Agreement Termination of the funding agreement	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	Either party may give not less than 7 financial years written notice to terminate the Agreement, such notice to expire on 31 August. Or, where the Academy has significant financial issues or is insolvent, the Agreement can be terminated by the Secretary of State to take effect on the date of the notice.
Funding	Funding Records Capital Grant	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
Funding	Funding Records Earmarked Annual Grant (EAG)	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
Funding	Funding Records General Annual Grant (GAG)	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
Funding	Per pupil funding records	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
Funding	Funding records	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	Funding agreement which says that the Academy can receive donations and can only charge where the law allows maintained schools to charge [see Charging and Remission Policy].
Funding	Gift Aid and Tax Relief	Yes	Date of last payment of funding + 6 years		SECURE DISPOSAL	

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Funding	Exclusions agreement	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	The Academy can enter into an arrangement with a Local Authority (LA), so that payment will flow between the Academy and the LA, in the same way as it would do were the Academy a maintained school.
Funding	Records relating to loans	No	Date of last payment on loan + 6 years if the loan is under 10,000 or date of last payment on loan + 12 years if the loan is over 10,000		SECURE DISPOSAL	
Funding	Management of Endowment Funds	No	Life of the fund + 6 years		SECURE DISPOSAL	
Funding	Investment policies	No	Life of the investment + 6 years		SECURE DISPOSAL	
Funding	Pupil Premium Fund records	Yes	Date pupil leaves the provision + 6 years		SECURE DISPOSAL	
Funding	Student Grant applications	Yes	Current year + 3 years		SECURE DISPOSAL	
Operational	Invoices, receipts, order books and requisitions, delivery notices	No	Current financial year + 6 years		SECURE DISPOSAL	
Operational	Records relating to the collection and banking of monies	No	Current financial year + 6 years		SECURE DISPOSAL	
Operational	Records relating to the identification and collection of debt	Yes	Payment or write off of debt + 6 years		SECURE DISPOSAL	

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Risk Management and Insurance	Employers Liability Insurance Certificate	No	Year of issue + 40 years. Pass to the Local Authority if the school closes	EXPLANATORY NOTE (This note is not part of the Regulations) These Regulations amend the Employers' Liability (Compulsory Insurance) Regulations 1998 (the 1998 Regulations). Regulation 2(1) omits paragraphs (4) and (5) from regulation 4 of the 1998 Regulations. Paragraph (4) required an employer to retain a copy of its employer liability insurance certificate for 40 years. Paragraph (5) was a consequential provision to paragraph (4), providing for the retention of certificates, and is therefore also being omitted. Paragraph (3) substitutes paragraphs (1) and (2) of regulation 5 of the 1998 Regulations. Under the new provisions, the requirements for the display of the certificate will be satisfied if the certificate is made available in electronic form and is reasonably accessible to the relevant employees. Paragraph (4) makes a consequential amendment to regulation 6(b) of the 1998 Regulations.	SECURE DISPOSAL	

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Risk Management and Insurance	Insurance policies	No	Date the policy expires + 6 years except Public Liability insurance - day of issue + 40 years	EXPLANATORY NOTE (This note is not part of the Regulations) These Regulations amend the Employers' Liability (Compulsory Insurance) Regulations 1998 (the 1998 Regulations). Regulation 2(1) omits paragraphs (4) and (5) from regulation 4 of the 1998 Regulations. Paragraph (4) required an employer to retain a copy of its employer liability insurance certificate for 40 years. Paragraph (5) was a consequential provision to paragraph (4), providing for the retention of certificates, and is therefore also being omitted. Paragraph (3) substitutes paragraphs (1) and (2) of regulation 5 of the 1998 Regulations. Under the new provisions, the requirements for the display of the certificate will be satisfied if the certificate is made available in electronic form and is reasonably accessible to the relevant employees. Paragraph (4) makes a consequential amendment to regulation 6(b) of the 1998 Regulations.	SECURE DISPOSAL	
Risk Management and Insurance	Records relating to the settlement of insurance claims	Yes	Date claim settled + 6 years		SECURE DISPOSAL	
Risk Management and Insurance	Burglary, theft and vandalism report forms		Current year + 6 years		SECURE DISPOSAL	
Risk Management and Insurance	Audit Committee and appointment of responsible officers	No	As long as necessary		SECURE DISPOSAL	Life of Academy. Under the Companies Act members can have their details removed after a certain time. Details should be removed on request.

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Fund	School Fund Ledger	Yes [ledger may contain names of people in receipt of grants]	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	Whole of government accounts returns	No	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	School Fund Journey books	No	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	School Fund Invoices	No	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	School Fund Receipts	No	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	School Fund Bank statements	No	Current financial year + 6 years		SECURE DISPOSAL	
School Fund	School Fund Cheque books	No	Current financial year + 1 year		SECURE DISPOSAL	
School Fund	School Fund Paying in books	No	Current financial year + 6 years		SECURE DISPOSAL	
School Meals	Free school meals registers	Yes	Current financial year + 3 years		SECURE DISPOSAL	
School Meals	School meals summary sheets	No	Current financial year + 6 years		SECURE DISPOSAL	
School Meals	School meals registers	Yes	Current financial year + 3 years		SECURE DISPOSAL	
Strategic Finance	Annual accounts	No	Current financial year + 6 years		SECURE DISPOSAL	
Strategic Finance	All records relating to the creation and management of budgets, including the Annual Budget statement and background papers	No	Life of the budget + 3 years		SECURE DISPOSAL	
Strategic Finance	Statement of financial activities for the year	No	Current financial year + 6 years		SECURE DISPOSAL	

Finance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Strategic Finance	Financial Planning	No	Current financial year + 6 years		SECURE DISPOSAL	

15 Governance

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Activities	Records relating to Governor Monitoring Visits	Yes	Date of the visit + 3 years		SECURE DISPOSAL	
Governance	Constitution	No	Date constitution superseded + 10 years. It may be appropriate to retain one copy of each constitution for archival purposes	Companies Act 2006 section 355	SECURE DISPOSAL	Companies Act 2006 Section 355: This section refers to Records of Resolutions and meetings etc. it does not mention Constitutions. Resolutions and minutes under this section to be retained for at least 10 years from date of meeting or decision as appropriate (Section 355 (2))
Governance	Articles of Association	No	Life of the Academy		SECURE DISPOSAL	
Governance	Memorandum of Association	No	This can be disposed of once the Academy has been incorporated		SECURE DISPOSAL	
Governance	Memorandum of Understanding of Shared Governance among Schools	No	Life of Memorandum of Understanding + 6 years		SECURE DISPOSAL	
Governance	Governance Statement	No	Life of governance statement + 6 years. One copy of each iteration may need to be retained for archive purposes		SECURE DISPOSAL	
Governance	Written Scheme of Delegation	Yes	Life of Written Scheme of Delegation + 10 years	Companies Act 2006 section 355	SECURE DISPOSAL	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Governance	Special Resolutions to amend the Constitution	No	Date constitution superseded + 10 years. It may be appropriate to retain one copy of each constitution for archival purposes	Companies Act 2006 section 355	SECURE DISPOSAL	Companies Act 2006 section 355 Section 355: This section refers to. Records of Resolutions and meetings etc. it does not mention. Constitutions. Resolutions and minutes under this section to be retained for at least 10 years from date of meeting or decision as appropriate (Section 355 (2))
Governance	Annual Report and Accounts, which includes: • Value for money statement • Borrowing powers • Independent audit report on regularity • Independent auditors report on financial statements • Records relating to management of VAT)	No	Date of report + 10 years	Companies Act 2006 section 356	SECURE DISPOSAL	
Governance	Annual Report Trustees Report	No	Date of report + 10 years	Companies Act 2006 section 357	SECURE DISPOSAL	
Governance	Annual Reports created under the requirements of the Education (Governors Annual Reports) (England) (Amendment) Regulations 2002	No	Date of report + 10 years		SECURE DISPOSAL	
Governance	Annual Return	No	Date of report + 10 years	Companies Act 2006 section 357	SECURE DISPOSAL	
Governance	Instruments of Government	No	For the life of the school		Consult local archives before disposal	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Governance	Register of Directors	Yes	Date Director resigns + 10 years	Companies Act 2006	SECURE DISPOSAL	Companies Act Section 121 Removal of entries relating to former members. An entry relating to a former member of the company may be removed from the register after the expiration of ten years from the date on which he ceased to be a member
Governance	Scheme of Delegation and Terms of Reference for Committees	No	Until superseded or whilst relevant [Schools may wish to retain these records for reference purposes in case decisions need to be justified]		These could be offered to the archives if appropriate	
Governance	Trusts and Endowments managed by the Governing Body	Yes	Life of the Trust or Endowment + 6 years		SECURE DISPOSAL	
Governance	Records relating to complaints dealt with by the Governing Body Annual Report and Accounts	Yes	Date complaint resolved + 3 years then review. If the complaint relates to negligence or safeguarding then date the complaint resolved + 15 years. If the complaint relates to child sexual abuse then the complaint resolved + 75 years (this retention period will be reviewed once the government and the ICO have issued guidance about the implementation of the IICSA recommendations)		SECURE DISPOSAL	
Governance	All records relating to the conversion of schools to Academy status	No	For the life of the organisation	Companies Act 2006 section 355	Consult local archives before disposal	
Governance	Policy documents created and administered by the Governing Body	No	Until superseded. The School should consider keeping all policies relating to safeguarding, child protection or other pupil related issues such as exclusion until the government and ICO have published guidance about the implementation of the recommendations made in the IICSA report		SECURE DISPOSAL	
Governors, Directors and Trustees	Appointment of Trustees and Governors and Directors	Yes	Life of appointment + 6 years	Companies Act 2006 section 355	SECURE DISPOSAL	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Governors, Directors and Trustees	Records relating to the election of parent and staff governors not appointed by the governors	Yes	Date of election + 6 months		SECURE DISPOSAL	
Governors, Directors and Trustees	Records relating to the appointment of co-opted governors	Yes	Provided that the decision has been recorded in the minutes the records relating to the appointment can be destroyed once the co-opted governor has finished their term of office except where there have been allegations concerning children. In this case retain for 25 years.		SECURE DISPOSAL	
Governors, Directors and Trustees	Records relating to the terms of office of serving governors including evidence of appointment	Yes	Date appointment ceases plus 6 years except where there have been allegations concerning children. In this case retain for 25 years.			
Governors, Directors and Trustees	Records relating to Governor Declaration against disqualification criteria	Yes	Date appointment ceases plus 6 years		SECURE DISPOSAL	
Governors, Directors and Trustees	Governors Code of Conduct	No	This is expected to be a dynamic document, one copy of each version should be kept for the life of the organisation		SECURE DISPOSAL	
Governors, Directors and Trustees	Records relating to DBS checks carried out on clerk and members of the governing body	Yes	Date of DBS check + 6 months (but need to retain a record of the date of the DBS check if you are renewing every 3-5 years depending on policy)		SECURE DISPOSAL	
Governors, Directors and Trustees	Governor personnel files	Yes	Date appointment ceases plus 6 years except where there have been allegations concerning children. In this case retain for 25 years		SECURE DISPOSAL	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Governors, Directors and Trustees	Records relating to the induction programme for new governors	Yes	Date appointment ceases plus 6 years		SECURE DISPOSAL	
Governors, Directors and Trustees	Records relating to the training required and received by Governors	Yes	Date Governor steps down + 6 years		SECURE DISPOSAL	
Governors, Directors and Trustees	Appointment and removal of Members	No	Life of appointment + 6 years		SECURE DISPOSAL	
Governors, Directors and Trustees	Register of members		Date Member resigns + 10 years	Companies Act 2006	SECURE DISPOSAL	
Governors, Directors and Trustees	Statement of Trustees Responsibilities	No	Life of statement + 6 years		SECURE DISPOSAL	
Governors, Directors and Trustees	Register of Trustees interests	Yes	Date Trustee resigns + 10 years	Companies Act 2006	SECURE DISPOSAL	
Governors, Directors and Trustees	Declaration of Interests Statements [Governors] [this is not a statutory register]	Yes	Date Governor resigns + 10 years		SECURE DISPOSAL	
Meetings	Board Meeting Minutes	Yes	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	OFFER TO ARCHIVES	
Meetings	Board Decisions	Could be if the decisions refer to living individuals	Date of the meeting + a minimum of 10 years		OFFER TO ARCHIVES	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Meetings	Board Meeting: Annual Schedule of Business	No	Current year		SECURE DISPOSAL	
Meetings	Board Meeting: Procedures for conduct of meeting	No	Date procedures superseded + 6 years	Limitation Act 1980 (Section 2)	SECURE DISPOSAL	
Meetings	Records relating to the management of General Members Meetings	No	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	OFFER TO ARCHIVES	
Meetings	Minutes relating to any committees set up by the Board of Directors	Could be if the minutes refer to living individuals	Date of the meeting + a minimum of 10 years		OFFER TO ARCHIVES	
Meetings	Records relating to the management of the Annual General Meeting	Could be if the minutes refer to living individuals	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	OFFER TO ARCHIVES	
Meetings	Meetings Schedule	No	Current year		STANDARD DISPOSAL	
Meetings	Agendas for Governing Body meetings	May be data protection issues, if the meeting is dealing with confidential issues relating to staff	One copy should be retained with the master set of minutes. All other copies can be disposed of		SECURE DISPOSAL	
Meetings	Agendas Additional Copies	No	Date of meeting		STANDARD DISPOSAL	

Governance						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Meetings	Minutes of, and papers considered at, meetings of the Governing Body and its committees: Principal Set (signed)	May be data protection issues, if the meeting is dealing with confidential issues relating to staff	Date of meeting + 10 years		OFFER TO ARCHIVES	
Meetings	Minutes of, and papers considered at, meetings of the Governing Body and its committees: Inspection Copies	Yes - May have names and personal issues unless redacted	Date of meeting + 10 years		SECURE DISPOSAL	
Meetings	Reports presented to the Governing Body	Yes	Date of meeting the report was presented to + 10 years		SECURE DISPOSAL or retain with the signed set of minute	
Meetings	Reports made to the Governors Meeting which are referred to in the minutes	Potential	Although generally kept for the life of the organisation, the Local Authority is only required to make these available for 10 years from the date of the meeting.	Companies Act 2006	Consult local archives before disposal	
Meetings	Register of attendance at Full Governing Board meetings	Yes	Date of last meeting in the book + 6 years		SECURE DISPOSAL	
Meetings	Papers relating to the management of the Annual Parents Meeting	Yes	Date of meeting + 6 years		SECURE DISPOSAL	

16 Health and Safety

Health and Safety

Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Health and Safety	Health and Safety policy statements	No	Life of policy + 3 years		SECURE DISPOSAL	
Health and Safety	Health and safety file to show current state of building including all alterations (wiring, plumbing, building works etc) and to be passed on in the case of change of ownership)	No	Pass to new owner on sale or transfer of building			
Health and Safety	Fire precautions log books	No	Current year + 6 years		SECURE DISPOSAL	
Health and Safety	Fire risk assessments	No unless containing Personal Emergency Evacuation plans	Life of the risk assessment + 3 years	Fire Service Order 2005	SECURE DISPOSAL	
Health and Safety	Accident reporting: Adults	Yes	Date of last entry in the accident book + 3 years but if there is possibility of negligence allegation then date of incident + 15 years or date of settlement + 6 years	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	SECURE DISPOSAL	The official Accident Book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format The incident reporting form may be retained as below IRMSTK17.9 Do not keep completed entries in the book. They must be removed and kept in a locked location.
Health and Safety	Records relating to accident/injury at work including incident reports	Yes	Date of incident plus 6 years unless the injury is serious - broken limb, more than 3 days in hospital etc then date of incident plus 15 years (Negligence)		SECURE DISPOSAL	
Health and Safety	Accident reporting: Children	Yes	The official Accident Book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format The incident reporting form may be retained as below IRMSTK17.9 Do not keep completed entries in the book. They must be removed and kept in a locked location.	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	SECURE DISPOSAL	The official Accident Book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format The incident reporting form may be retained as below [see also the incident reporting form]

Health and Safety	Control of Substances Hazardous to Health (COSHH)	No	COSHH sheets should be kept whilst the substance is in use + 6 years COSHH policy documents should be kept until the policy is superseded + 6 years		ECURE DISPOSAL	
Health and Safety	Records relating to any reportable death, injury, disease or dangerous occurrence (RIDDOR)	Yes	Date of incident + 3 years provided that all records relating to the incident are held on personnel file. See IRMSTK17.5 and IRMSTK17.7	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12(2)	SECURE DISPOSAL	For more information see: http://www.hse.gov.uk/RIDDOR/ https://www.hse.gov.uk/pubns/edis1.htm concerns schools
Health and Safety	Health and Safety risk assessments	No	Life of risk assessment + 3 years		SECURE DISPOSAL	
Health and Safety	Process of monitoring of areas where employees and persons have or are likely to have come into contact with asbestos	Yes	Last action + 40 years	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	SECURE DISPOSAL	
Health and Safety	Process of monitoring of areas where employees and persons are likely to have come into contact with radiation: Dose assessment and recording	No	2 years from the date on which the examination was made and that the record includes the condition of the equipment at the time of the examination. To keep the records made and maintained or a copy of these records until the person to whom the record relates has or would have attained the age of 75 years but in any event for at least 30 years from when the record was made	The Ionising Radiations Regulation 2017	SECURE DISPOSAL	

17 HR

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Disciplinary	Disciplinary Proceedings: Oral warning	Yes	Date of warning + 6 months		SECURE DISPOSAL	Where the warning relates to child protection issues, see above. If the disciplinary proceedings relate to a child protection matter, please contact your Safeguarding Children Officer for further advice. Relevant to all disciplinary cases. The ACAS code of practice on disciplinary and grievance procedures recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period. Any disciplinary proceedings data will be a record of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line and defend him- or herself by saying "I would never do something like that", reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence and then claim at tribunal that he or she had "fifteen years of unblemished service", the record of the disciplinary proceedings would be effective evidence to counter this claim. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept. Any retained disciplinary data will be stored securely and accessed only for legitimate HR or safeguarding purposes, in line with data protection legislation such as the UK GDPR.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Disciplinary	Disciplinary Proceedings: Written warning level 1	Yes	Date of warning + 6 months		SECURE DISPOSAL	If warnings are placed on personal files, then they must be weeded from the file. Where the warning relates to child protection issues, see above. If the disciplinary proceedings relate to a child protection matter, please contact your Safeguarding Children Officer for further advice. Relevant to all disciplinary cases. The ACAS code of practice on disciplinary and grievance procedures recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period. Any disciplinary proceedings data will be a record of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line and defend him- or herself by saying "I would never do something like that", reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence and then claim at tribunal that he or she had "fifteen years of unblemished service", the record of the disciplinary proceedings would be effective evidence to counter this claim. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept. Any retained disciplinary data must be stored securely and accessed only for legitimate HR or safeguarding purposes, in line with data protection legislation such as the UK GDPR.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Disciplinary	Disciplinary Proceedings: Written warning level 2	Yes	Date of warning + 12 months		SECURE DISPOSAL	If warnings are placed on personal files, then they must be weeded from the file. Where the warning relates to child protection issues, see above. If the disciplinary proceedings relate to a child protection matter, please contact your Safeguarding Children Officer for further advice. Relevant to all disciplinary cases. The ACAS code of practice on disciplinary and grievance procedures recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period. Any disciplinary proceedings data will be a record of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line and defend him- or herself by saying "I would never do something like that", reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence and then claim at tribunal that he or she had "fifteen years of unblemished service", the record of the disciplinary proceedings would be effective evidence to counter this claim. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept. Any retained disciplinary data must be stored securely and accessed only for legitimate HR or safeguarding purposes, in line with data protection legislation such as the UK GDPR.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Disciplinary	Disciplinary Proceedings: Final warning	Yes	Date of warning + 18 months		SECURE DISPOSAL	If warnings are placed on personal files, then they must be weeded from the file. Where the warning relates to child protection issues, see above. If the disciplinary proceedings relate to a child protection matter, please contact your Safeguarding Children Officer for further advice. Relevant to all disciplinary cases. The ACAS code of practice on disciplinary and grievance procedures recommends that the employee should be told how long a disciplinary warning will remain current. However, this does not mean that the data itself should be destroyed at the end of the set period. Any disciplinary proceedings data will be a record of an important event in the course of the employer's relationship with the employee. Should the same employee be accused of similar misconduct five years down the line and defend him- or herself by saying "I would never do something like that", reference to the earlier proceedings may show that the comment should not be given credence. Alternatively, if the employee were to be dismissed for some later offence and then claim at tribunal that he or she had "fifteen years of unblemished service", the record of the disciplinary proceedings would be effective evidence to counter this claim. Employers should, therefore, be careful not to confuse the expiry of a warning for disciplinary purposes with a requirement to destroy all reference to its existence in the personnel file. One danger is that the disciplinary procedure itself often gives the impression that, at the end of the effective period for the warning, the warning will be "removed". This or similar wording should be changed to make it clear that, while the warning will not remain active in relation to future disciplinary matters, a record of what has occurred will be kept. Any retained disciplinary data must be stored securely and accessed only for legitimate HR or safeguarding purposes, in line with data protection legislation such as the UK GDPR.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Disciplinary	Disciplinary Proceedings: Case not found	Yes	If the incident is child protection related, then see IRMSTK29.1 otherwise dispose of at the conclusion of the case		SECURE DISPOSAL	
Pay and Pensions	Records relating to the agreement of pay and conditions	No	Date pay and conditions superseded + 6 years		SECURE DISPOSAL	
Pay and Pensions	Payroll records	Yes	Date payroll run + 6 years		SECURE DISPOSAL	
Pay and Pensions	Payroll reports	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Payroll awards	Yes	Current tax year + 6 years		SECURE DISPOSAL	
Pay and Pensions	Payroll gross / net weekly or monthly	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Payslips copies	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1989	SECURE DISPOSAL	
Pay and Pensions	Pay packet receipt by employee	Yes	Current tax year + 2 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Maternity pay records	Yes	Current tax year + 3 years	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	SECURE DISPOSAL	
Pay and Pensions	Part time fee claims	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Overtime	Yes	Current tax year + 3 years		SECURE DISPOSAL	
Pay and Pensions	National Insurance Schedule of payments	Yes	Current tax year + 6 years		SECURE DISPOSAL	
Pay and Pensions	Insurance	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Car allowance claims	Yes	Current tax year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Pay and Pensions	Car mileage output	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1989	SECURE DISPOSAL	
Pay and Pensions	Car loans	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Time sheets /clock cards / flexitime	Yes	Current tax year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Bonus sheets	Yes	Current tax year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
Pay and Pensions	Staff returns	Yes	Current tax year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1989	SECURE DISPOSAL	
Pay and Pensions	Sickness records	Yes	Current tax year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1990	SECURE DISPOSAL	
Pay and Pensions	Tax forms P6 /P11 / P11D / P35 / P45/ P46 / P48	Yes	Current tax year + 6 years		SECURE DISPOSAL	
Pay and Pensions	Personal bank details	Yes	Until superseded + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1990	SECURE DISPOSAL	
Pay and Pensions	Income tax form P60	Yes	Current tax year + 6 years. Employees should keep your records for at least 22 months from the end of the tax year they relate to. The tax year runs from 6 April to the following 5 April, so keep paperwork until at least 31 January nearly two years later. For example, you should keep records relating to the tax year 2022/23 (which ends 5 April 2023) until 31 January 2025 or longer if you are self-employed.	Taxes Management Act 1970; Income and Corporation Taxes 1991	SECURE DISPOSAL	There is no harm in keeping them longer than strictly required. In particular, it is possible to go back up to four tax years to claim some reliefs and to claim a tax refund. In order to make those claims you need supporting evidence, so it would be helpful to keep records for at least four years after the end of the tax year.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Pay and Pensions	Pension payroll	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1992	SECURE DISPOSAL	
Pay and Pensions	Superannuation adjustments	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1993	SECURE DISPOSAL	
Pay and Pensions	Superannuation reports	Yes	Completion of loan + 6 years		SECURE DISPOSAL	
Pay and Pensions	Members Allowance register	Yes	Current tax year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1993	SECURE DISPOSAL	
Pay and Pensions	Records relating to pension registrations	Yes	Date of last payment on the pension + 6 years		SECURE DISPOSAL	
Pay and Pensions	Management of the Teachers Pension Scheme	Yes	Date of last payment on the pension + 6 years		SECURE DISPOSAL	
Pay and Pensions	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes	From the end of the year in which the accounts were signed for a minimum of 6 years	Retirement Benefits Schemes (Information Powers) Regulations 1995 (SI 1995/3103) Regulation 15	SECURE DISPOSAL	
Recruitment	All records leading up to the appointment of a new Head Teacher	Yes	Length of appointment + 6 years		SECURE DISPOSAL	Academies do not necessarily have to employ people with qualified teacher status; only the SEN and designated LAC teacher must be qualified.
Recruitment	All records leading up to the appointment of a new member of staff successful candidate	Yes	All relevant information should be added to the Staff Personal File (see below) and all other information retained for 6 months		SECURE DISPOSAL	
Recruitment	All records leading up to the appointment of a new member of staff unsuccessful candidates	Yes	Date of appointment of successful candidate + 6 months		SECURE DISPOSAL	

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Recruitment	Pre-employment vetting information DBS Checks	Yes	Schools are not required to retain copies of DBS certificates in order to maintain the Single Central Record (SCR). If a school chooses to retain a copy, there must be a valid reason, and the copy should not normally be kept for more than six months. Once a recruitment or other decision has been made, full certificate content should be securely destroyed within that period. After destruction of the certificate itself, the school may retain only limited certificate metadata (e.g. date of issue, subject name, type of check, position checked, DBS reference number, recruitment decision). This aligns with the DBS Code of Practice, which permits retention of such information to satisfy audit, complaints, or safeguarding requirements. All retained data must be stored securely, access strictly controlled, and destruction carried out by secure means (e.g. shredding, secure deletion). In exceptional circumstances (e.g. safeguarding investigations, legal proceedings, risk management), retention beyond six months may be justified, but such cases must be documented, justified, and consistent with data protection principles.	https://www.gov.uk/government/publications/dbs-update-service-employer-guide/dbs-update-service-employer-guide DBS Update Service Employer Guide June 2014; Keeping Children Safe in Education 2018 (Statutory Guidance from Dept. of Education) Sections 73, 74	SECURE DISPOSAL	Academies are bound by the legislation that applies to independent schools NOT maintained schools.

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Recruitment	Proofs of identity collected as part of the process of checking portable enhanced DBS disclosure	Yes	During recruitment and onboarding, the school must verify identity, right to work, and required qualifications, and record what documents were seen, who checked them, and when. Copies of these identity, right to work, and qualification documents must be kept on the Staff Personal File in line with paragraph 276 of KCSIE. Any retention of copies must comply with data protection principles: it must be lawful, necessary, proportionate, securely stored, and retained only for as long as necessary.		SECURE DISPOSAL	
Recruitment	Pre-employment vetting information. Evidence proving the right to work in the United Kingdom	Yes	Copies of documents used to verify identity, right to work in the UK, and required qualifications should normally be stored securely on the Staff Personal File, in accordance with KCSIE. Where right to work check documents are stored separately, the Home Office requires that these documents are retained for the duration of employment and for at least two years after employment ends. All vetting documentation must be retained securely and only for as long as necessary, in line with UK GDPR.	Employer's guide to right to work checks: 26 June 2025 (accessible) - GOV.UK	SECURE DISPOSAL	Employers are required to take a clear copy of the documents which they are shown as part of this process
Recruitment	Records relating to the employment of overseas teachers	Yes	Where possible, these documents should be added to the Staff Personal File, but if they are kept separately, then the Home Office requires that the documents are kept for termination of employment plus not less than 2 years		SECURE DISPOSAL	

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Safeguarding	Allegation which is child protection in nature against a member of staff, including where the allegation is unfounded	Yes	Such records should be retained for the duration of the individual's employment plus a minimum of 10 years following the end of their employment or until the individual's 70th birthday (whichever is longer). This approach aligns with guidance from the Department for Education and supports compliance with Keeping Children Safe in Education (KCSIE) , ensuring the school can respond to any future safeguarding concerns, legal claims, or regulatory investigations.		SECURE DISPOSAL	The retention period will be reviewed once the guidance by the government and ICO about implementing the recommendations made by ICSEA has been published.
Staff Management	Staff Personal File, including employment	Yes	Termination of employment + 6 years	Limitation Act 1980	SECURE DISPOSAL	

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
	contract and staff training records					
Staff Management	Timesheets	Yes	Current year + 3 years		SECURE DISPOSAL	
Staff Management	Absence record	Yes	Current year + 3 years		SECURE DISPOSAL	
Staff Management	Sickness Absence Monitoring	Yes	Sickness records are categorised as sensitive data. There is a legal obligation under statutory sickness pay to keep records for sickness monitoring. Sickness records should be kept separate from accident records' (2003) It could be argued that where sickness pay is not paid then current year + 3 years is acceptable whilst if sickness pay is made then it becomes a financial record and current year + 6 years applies. The actual retention may depend on the internal auditors. Most seem to accept current year+ 3 years as being acceptable as this gives them, 'Benefits' and Inland Revenue time to investigate if they need to.		SECURE DISPOSAL	
Staff Management	Annual appraisal/assessment records	Yes	Current year + 3 years		SECURE DISPOSAL	
Staff Management	Records relating to the TUPE process	Yes	Date last member of staff transfers or leaves the organisation + 6 years		SECURE DISPOSAL	

HR						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Staff Management	Training needs analysis	No	Current year + 1 year		SECURE DISPOSAL	
Staff Management	Staff Training where the training leads to Continuing Professional Development	Yes	Length of time required by the professional body		SECURE DISPOSAL	
Staff Management	Staff Training except where dealing with children, e.g. First Aid or Health and Safety	Yes	This should be retained on the staff personnel file		SECURE DISPOSAL	
Staff Management	Staff Training where the training relates to children (e.g. safeguarding or other child related training)	Yes	Date of the training + 40 years		SECURE DISPOSAL	This retention period will be reviewed when the government and ICO have published guidance about how to implement the recommendations made by IICSA.
Staff Management	Professional Development Plans	Yes	Life of the plan or plan superseded + 6 years		SECURE DISPOSAL	

18 Liaison with Local Authorities and Department for Education (DfE)

Liaison with Local Authorities and Department for Education (DfE)						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Liaison with LA-DfE	OFSTED reports and papers	No	Life of the report then REVIEW		SECURE DISPOSAL	
Liaison with LA-DfE	Returns made to central government	No	Current year + 6 years		SECURE DISPOSAL	

Liaison with Local Authorities and Department for Education (DfE)						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Liaison with LA-DfE	School census returns	No	Current year + 5 years		SECURE DISPOSAL	
Liaison with LA-DfE	Circulars and other information sent from the Local Authority		Operational use		SECURE DISPOSAL	
Liaison with LA-DfE	Circulars and other information sent from central government	No	Operational use		SECURE DISPOSAL	
Liaison with LA-DfE	Attendance returns	Yes	Academic year + 1 year		SECURE DISPOSAL	
Liaison with LA-DfE	Secondary transfer sheets (Primary)	Yes	Academic year + 2 years		SECURE DISPOSAL	

19 Parent Teacher Association

Parent Teacher Association						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Parent Teacher Association	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Yes	Current year + 6 years then REVIEW		SECURE DISPOSAL	

20 Property

Property						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Property	Title deeds of properties belonging to the school	No	These should follow the property, unless the property has been registered with the Land Registry		Transfer to new owner	
Property	Plans of property belonging to the school, including any alterations. This is also a health and safety requirement and includes rewiring diagrams and additional fire safety features	No	These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold		Pass to next owner	
Property	Leases of property leased by or to the school	No	Expiry of lease + 6 years		SECURE DISPOSAL	
Property	Business continuity and disaster recovery plans	Yes	These are dynamic documents which should be kept up to date		SECURE DISPOSAL OF OLD PLANS	
Property	Records relating to the letting of school premises	No	Current financial year + 6 years		SECURE DISPOSAL	

21 Pupils and Students

Pupils and Students						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Pupils and Students	Pupils Educational Record required by The Education (Pupil Information) (England) Regulations 2005: Primary	Yes	Retain whilst the child remains at the primary school	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437	The file should follow the pupil when they leave the primary school. This will include: To another primary school To a secondary school To a pupil referral unit If the pupil dies whilst at primary school, the file should be returned to the LA to be retained for the statutory retention period. If the pupil transfers to an independent school, transfers to home schooling or leaves the country, the school should discuss with the local authority about where the file should be stored for the remainder of its statutory retention	
Pupils and Students	Pupils Educational Record required by The Education (Pupil Information) (England) Regulations 2005: Secondary	Yes	Date of birth of the pupil + 25 years	Limitation Act 1980 (Section 2)	SECURE DISPOSAL	Section 2: Time limit for actions founded on tort. An action founded on tort shall not be brought after the expiration of 6 years from the date on which the cause of action accrued

Pupils and Students						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Pupils and Students	Attendance registers	Yes	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made.	School attendance Guidance for maintained schools, academies, independent schools and local authorities [updated and re-published annually]	SECURE DISPOSAL	
Pupils and Students	Correspondence relating to any absence (authorised or unauthorised)	Potential	Current academic year + 2 years	Education Act 1996 Section 7	SECURE DISPOSAL	

22 Pupils and Workforce Electronic Images Including Photographs and Videos

Pupils and Students						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Images including photographs and videos	Photographs used in identity management	Yes	Delete once a pupil leaves school		SECURE DISPOSAL	
Images including photographs and videos	Photographs in the Trust/school environment	Yes	Delete once a pupil leaves the school		STANDARD DISPOSAL	
Images including photographs and videos	Photographs used for learning resources or promotion of the academy or Trust including website, or prospectus	Yes	Permission must be sought to retain images beyond the time the pupil leaves the school. Consent form allows for consent to be given for use after a pupil leaves the school. Every attempt should be used to replace these images as soon as reasonably possible for		STANDARD DISPOSAL	

Pupils and Students						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Images including photographs and videos	CCTV Images		Unless CCTV records a specific incident then it is unlikely to be justifiable to retain any recorded images for more than 7 days, as per TMET CCTV Policy		SECURE DISPOSAL	

23 School Admissions

School admissions						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Admissions	All records relating to the creation and implementation of the School Admissions Policy	No	Life of the policy + 7 years. 15(2) of the regulation refers to the 7 preceding years	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
School Admissions	Register of admissions	Yes	Every entry in the admission register must be preserved for a period of 3 years after the date on which the entry was made.	School attendance: Departmental advice for maintained schools, Academies, independent schools and local authorities.	REVIEW Schools may wish to consider keeping the admission register permanently, as often schools receive enquiries from past pupils to confirm the dates they attended the school	

School admissions						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Admissions	Admissions if the appeal is unsuccessful	Yes	Resolution of case + 1 year	School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
School Admissions	Admissions if the admission is successful	Yes	Date of admission + 1 year	School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
School Admissions	Admissions Secondary Schools Casual	Yes	Current academic year + 1 year		SECURE DISPOSAL	
School Admissions	Proofs of address supplied by parents as part of the admissions process	Yes	Current academic year + 1 year	School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
School Admissions	Supplementary information form, including additional information such as religion and medical conditions: For successful admissions	Yes	This information should be added to the pupil file		As per pupil file	
School Admissions	Supplementary information form, including additional information such as religion and medical conditions: For unsuccessful admissions.	Yes	Until appeals process completed		SECURE DISPOSAL	
School Admissions	Records relating to the management of exclusions	Yes	Date of birth of the pupil involved + 25 years		SECURE DISPOSAL	

24 School Assets

School assets						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Assets	Community School leases for land	No	Date lease expires + 6 years		SECURE DISPOSAL	
School Assets	Commercial transfer arrangements	No	Date of transfer + 6 years		SECURE DISPOSAL	
School Assets	Transfer of land to the Academy Trust	No	Life of land ownership then transfer to new owner		SECURE DISPOSAL	
School Assets	Transfers of freehold land	No	Life of land ownership then transfer to new owner		SECURE DISPOSAL	
School Assets	Records relating to the leasing of shared facilities, such as sports centres	No	End of lease + 6 years		SECURE DISPOSAL	
School Assets	Land and building valuations	No	Date valuation superseded + 6 years		SECURE DISPOSAL	
School Assets	Disposal of assets	No	Date asset disposed of + 6 years		SECURE DISPOSAL	
School Assets	Burglary, theft and vandalism report forms	No	Date of insurance settlement + 6 years		SECURE DISPOSAL	
School Assets	Inventories of furniture and equipment	No	Life of equipment + 6 years. Equipment will have write-down value over several years - the time depending on the type of equipment		SECURE DISPOSAL	

25 School Management

School Management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Management	Log books of activity in the school maintained by the Head Teacher	There may be data protection issues if the log book refers to individual pupils or members of staff	Date of last entry in the book + a minimum of 6 years then REVIEW		These could be of permanent historical value and should be offered to the County Archives Service, if appropriate	
School Management	Visitor Management Systems (including electronic systems, visitors books and signing in sheets)	Yes	6 months		SECURE DISPOSAL	
School Management	School Privacy Notice which is sent to parents as part of GDPR compliance	No	Life of the privacy notice/until the privacy notice plus 6 years		SECURE DISPOSAL	
School Management	Consents relating to school activities as part of GDPR compliance (for example, consent to be sent circulars or mailings)	Yes	Consents should be retained for as long as the consent is relied on.		SECURE DISPOSAL	
School Management	Records relating to the creation and distribution of circulars to staff, parents or pupils	No	Current year + 1 year		STANDARD DISPOSAL - Schools should decide whether items published on the school website are retained as an archive or whether they should be deleted at the same	

School Management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
					time as the master copy	
School Management	Minutes of Senior Management Team meetings and meetings of other internal administrative bodies	There may be data protection issues if the minutes refers to individual pupils or members of staff	Date of the meeting + 3 years then REVIEW		SECURE DISPOSAL	
School Management	Reports created by the Head Teacher or the Management Team	There may be data protection issues if the report refers to individual pupils or members of staff	Date of the report + a minimum of 3 years then REVIEW		SECURE DISPOSAL	
School Management	Records created by Head Teachers, Deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff	Current academic year + 3 years then REVIEW		SECURE DISPOSAL	

School Management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Management	Correspondence created by Head Teachers, Deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the correspondence refers to individual pupils or members of staff	Date of correspondence + 3 years then REVIEW		SECURE DISPOSAL	
School Management	Management of complaints	Yes	Date complaint resolved + 3 years then review. If the complaint relates to negligence or safeguarding then date the complaint resolved + 15 years. If the complaint relates to child sexual abuse then the complaint resolved + 75 years (this retention period will be reviewed once the government and the ICO have issued guidance about the implementation of the IICSA recommendations)		SECURE DISPOSAL	
School Management	Newsletters and other items with a short operational use	No	Current year + 1 year		SECURE DISPOSAL - Schools should decide whether items published on the school website are retained as an archive or whether they should be deleted at the same time as the master copy	
School Management	Records relating to the creation and publication of the school brochure or prospectus	No	Current year + 3 years. Schools should consider archiving one copy for historical reasons		STANDARD DISPOSAL	

School Management						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
School Management	Telephone recordings made for quality and training purposes.	Yes	30 days		SECURE DISPOSAL	

26 Special Education Needs and Disabilities

Special Education Needs and Disabilities						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Special Education Needs and Disabilities	Special Educational Needs files, reviews and Individual Education Plans	Yes	Date of birth of the pupil + 25 years	Limitation Act 1980	SECURE DISPOSAL	
Special Education Needs and Disabilities	Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then 6 years after legal action ended	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	SECURE DISPOSAL	IICSA recommendations awaited
Special Education Needs and Disabilities	Advice and information provided to parents regarding educational needs	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years	Special Educational Needs and Disability Act 2001 Section 2	SECURE DISPOSAL	This retention period will be reviewed once the government and the Information Commissioner have published guidance about implementing the recommendations made by IICSA.

Special Education Needs and Disabilities	Accessibility strategy	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years	Special Educational Needs and Disability Act 2001 Section 14	SECURE DISPOSAL	This retention period will be reviewed once the government and the Information Commissioner have published guidance about implementing the recommendations made by IICSA.
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27 Teaching and the Curriculum

Teaching and the Curriculum						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Teaching and the Curriculum	Schemes of Work	No	Current year + 1 year		It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL	
Teaching and the Curriculum	Timetable	No	Academic year + 1 year		It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL	
Teaching and the Curriculum	Class record books	No	Academic year + 1 year		It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL	
Teaching and the Curriculum	Mark books	No	Academic year + 1 year		It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL	

Teaching and the Curriculum						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Teaching and the Curriculum	Record of homework set	No	Academic year + 1 year		It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL	
Teaching and the Curriculum	Pupils work	Yes	Where possible, work should be returned to the pupil at the end of the academic year. If this is not the schools policy, then current year + 1 year		SECURE DISPOSAL	

28 Transport (Educational)

Transport (Educational)						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Transport (Educational)	The process of acquisition and disposal of vehicles through lease or purchase, e.g., contracts/leases, quotes, approvals	No	Disposal of the vehicle + 6 years	Limitation Act 1980	SECURE DISPOSAL	
Transport (Educational)	The process of managing allocation and maintenance of vehicles, e.g., lists of who was driving the vehicles and when, and maintenance	No	Disposal of the vehicle + 6 years	Limitation Act 1981	SECURE DISPOSAL	

Transport (Educational)						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Transport (Educational)	Service logs and vehicle logs	No	Life of the vehicle, then either to be retained for 6 years by school or to be returned to lease company	Limitation Act 1982	SECURE DISPOSAL	
Transport (Educational)	GPS tracking data relating to the vehicles	No	Current year + 12 months	Limitation Act 1983	SECURE DISPOSAL	
Transport (Educational)	Tachograph: Analogue and electronic including driver's cards	Yes	Current year + 12 months	Transport Act 1968 Chapter 73 Sections 96, 98, 99, 103. Passenger and Goods Vehicles (Recording Equipment) Regulations 2005 SI 2005 No 1904. Passenger and goods Vehicles (Recording Equipment) (downloading and Retention of Data) Regulations 2008 SI 2008 No 198. EC Regulation 561/2006 EC or AETR rules may also apply includes digital recording equipment	SECURE DISPOSAL	
Transport (Educational)	Driver's records book	Yes	12 months from date of return of book to employer or in the case of owner driver 12 months from date of completion of book or it ceased to be used Driver to retain book for 14 days after all weekly record sheets have been used.	Transport Act 1968 Chapter 73 Sections 96, 98, 99, 103. Drivers' Hours (Goods Vehicles) (Keeping of Records) Regulations 1987. SI 1987 No.1421. Regulation 11 Preservation of driver's record books.	SECURE DISPOSAL	
Transport (Educational)	Walking bus registers	Yes	Date of register + 3 years. 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		SECURE DISPOSAL [If these records are retained electronically any back up copies should be destroyed at the same time]	

29 Welfare

Welfare						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Welfare	Family Liaison Officers and Home School Liaison Assistants: Day Books	Yes	Current year + 2 years then review		SECURE DISPOSAL	
Welfare	Family Liaison Officers and Home School Liaison Assistants: Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes	Whilst child is attending school and then destroy		SECURE DISPOSAL	
Welfare	Family Liaison Officers and Home School Liaison Assistants: Referral forms	Yes	While the referral is current		SECURE DISPOSAL	
Welfare	Family Liaison Officers and Home School Liaison Assistants: Contact data sheets	Yes	Current year then review, if contact is no longer active then destroy		SECURE DISPOSAL	
Welfare	Family Liaison Officers and Home School Liaison Assistants: Contact database entries	Yes	Current year then review, if contact is no longer active then destroy		SECURE DISPOSAL	
Welfare	Family Liaison Officers and Home School Liaison Assistants: Group Registers	Yes	Current year + 2 years		SECURE DISPOSAL	

Welfare						
Sub-Category	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
Welfare	Accessibility Plan relating to individual pupils	Yes	The plan should be included on the pupil file	Limitation Act 1980	SECURE DISPOSAL	
Welfare	Child protection information held on pupil file	Yes	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file	Keeping children safe in education Statutory guidance for schools and colleges 2018; Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018	SECURE DISPOSAL	This retention period will be reviewed when the government and ICO have published guidance about the implementation of the recommendations made by IICSA.
Welfare	Child protection information held in separate files	Yes	Date of birth of the child + 25 years then REVIEW This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the LA Social Services record	Keeping children safe in education Statutory guidance for schools and colleges 2018; Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018	SECURE DISPOSAL these records MUST be shredded	This retention period will be reviewed when the government and ICO have published guidance about the implementation of the recommendations made by IICSA.
Welfare	Correspondence relating to authorised absence	Yes	Current academic year + 2 years	Education Act 1996 Section 7	SECURE DISPOSAL	