Disposal of Records Schedule and Records Management Policy

TYNE &WEAR LEARNING TRUST

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Section 1 – Introduction

1. Functions of Tyne and Wear Learning Trust

Tyne and Wear Learning Trust operates primary academies and early years provision for children from birth to age 11 across the Tyne and Wear area.

The Trust also operates daycare provision, community facilities and spaces used for parental, children's and community activities.

2. Purpose of Disposal Schedule

This disposal schedule identifies the retention and disposal arrangements for all records created, received or held by Tyne and Wear Learning Trust and its academies. It applies equally to paper and electronic records, including Arbor, CPOMS, email, shared drives, cloud services, collaboration platforms, photographs, CCTV, audio, video, backups and records held by processors. Each academy and central team must review its information at least annually and securely delete or anonymise information when it is no longer required. No system is exempt from active retention review.

3. Categories of Disposal

- Destruction
- Review
- Permanent preservation

Section 2 – Operation of this Disposal of Records Schedule

1. Close

Manual records should be closed as soon as they have ceased to be of active use other than for reference purposes. When a file is due to be closed the appropriate member of staff should consult the disposal schedule and mark the front cover of the file, indicating the date on which the file can be destroyed, or whether it should be subject to the normal review procedures. Closing a file simply means that no further papers can be added but the file can be used for reference.

2. Minimum Retention Period

Unless the schedule states otherwise, the minimum retention period is calculated from the date the record is closed, the end of the relevant school or financial year, or the event specified in the schedule. Retention periods are minimum periods, not permission to keep personal data indefinitely.

3. Destroy

Where the disposal action is “Secure disposal”, records must be destroyed so that they cannot be read or reconstructed. Paper records must be cross-cut shredded or destroyed by an approved confidential-waste contractor. Electronic records must be securely erased from live systems and, where technically feasible, scheduled for deletion from backups in accordance with the Trust backup cycle. Storage media must be securely sanitised or physically destroyed. A destruction register must record the record category, date range, quantity, disposal date and method, authorising senior leader, person or contractor completing disposal, and certificate of destruction where applicable. Records must never be placed in ordinary waste or an unsecured skip.

4. Review

Where the disposal action is “Review”, the information owner must decide whether there remains a documented legal, regulatory, safeguarding, operational, historical or litigation reason to retain the record. The decision and the next review date must be recorded. Records must not be kept “just in case”. Where continued identification is unnecessary, records should be securely deleted or irreversibly anonymised.

(a) The designated information owner must carry out the review, consulting the Data Protection Officer, safeguarding lead, governance professional, finance lead or legal adviser where appropriate.

(b) The reviewing officer must document the reason for continued retention. The Trust will use annual information audits to identify new record series, systems and processors and will update this schedule where necessary. Disposal must be suspended when records are relevant to a subject access request, Freedom of Information request, complaint, grievance, safeguarding process, investigation, audit, legal claim, litigation hold or anticipated proceedings.

5. Permanent Preservation

Records selected for permanent preservation must be identified and protected from routine deletion. The Trust will consult the appropriate local archive or The National Archives where records have enduring historical value. Personal data retained for archiving must be subject to appropriate safeguards.

6. Commitment to preserving files/records

Tyne and Wear Learning Trust declares that it will take measures to ensure that the records it creates will be physically well maintained and cared for while they are in its custody (i.e. until either destroyed or retained for permanent preservation).

7. Roles and Responsibilities

The Board of Trustees has overall accountability for records management. The CEO ensures Trust-wide implementation. Headteachers and central directors are information owners for their areas and must ensure that records, systems and third-party services comply with this policy. The Data Protection Officer advises, monitors compliance and supports audits but does not replace management accountability. All staff must create accurate records, use approved systems, apply access controls and follow retention, legal-hold and secure-disposal requirements.

Each academy and central function must appoint a records-management contact to coordinate annual reviews, maintain the destruction register and identify new record series. ICT staff and system owners must ensure retention rules are applied to electronic systems, accounts, shared storage and backups, and that contracts with processors support secure return or deletion of Trust information.

Section 3 – Definitions of Records held by Tyne and Wear Learning Trust and its academies in respect of each functional business area.

There are seven main functional business areas for which the Trust and its academies keep records:

1. Management and Organisation
2. Legislation & Guidance
3. Pupils
4. Staff
5. Finance
6. Health & Safety
7. Daycare

The records contained within these functional areas provide evidence and information about its business activities that are important for the efficient operation of the school.

1. Management and Organisation

This category includes the main records which the School holds in relation to the management and organisation of the school. Typical records would include the minutes of the Board of Governors, the Senior Management Team and any Parent/Teachers Association meetings which record the major decision making processes of the school. Also included are records detailing development, planning and curriculum policies as well as those that demonstrate how the school reports to its parents and other organisations. Records include the School Development Plan, the School Prospectus, Curriculum policies, Annual Report, Emergency Planning and Business Continuity Plan along with the records of meetings, minutes, and policies documenting the decisions and actions taken within this business function.

2. Legislation and Guidance from DFE

Files maintained under this heading contain papers relating to legislation e.g. the Circulars, Guidance, Bulletins from the Dept for Education etc. Correspondence in connection with Statistical Returns and documents relating to Dept for Education Inspections and Reports.

3. Pupils

Pupil Files contain vitally important records which, not only, capture the progress of the student throughout their time at the school, but also document their personal details and information beneficial to their well being within the school environment. Such records would include Admission Data, Attendance of the pupils at the school, Timetables and Class Groupings, Education/Progress Reports of pupils, Special Education Needs documentation, Child Protection information, Disciplinary Action taken, Examination Results, Careers Advice, School Trips details and Medical Records (details of medical conditions where medicines are required to be administered at school).

4. Staff

Records in this category refer to be those required for the Human Resources Management function within the school. These include Staff Personnel records (recruitment, interview notes, appointments, training, staff development etc), Staff Salary Records, Staff Induction, Sickness Records, Staff Performance Review, Substitute Teacher Records and Student Teachers on Teaching Practice etc.

5. Finance

This business function within the school maintains records for a range of finance activities such as Annual Budgets, Budget Monitoring, Annual Statement of Accounts, Procurement, Tender Information and Prices, Reconciliation of Invoices, Audit Reports etc.

6. Health & Safety

The health and safety of children and staff are of paramount importance in the school and such records to support this are kept e.g. Accident/Incident Book, Legal/Accident/Incident Forms, Risk Assessments, Fire Procedure, CCTV, Security System Files, Health and Safety Policy Statement.

7. Daycare/Community Lettings

This additional business trust function maintains records that include similar information from the previous six headings but are specific to the Daycare nursery or community lettings functions.

The tables for retention periods are based on information provided by the Information Records Management Society (IRMS) and the DfE and are not an exhaustive list of records that may be kept by schools.

SECTION 4 - SCHOOL DISPOSAL SCHEDULE

1. Management & Organisation

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Trust- Articles of Association		Life of the Trust; retain permanently where part of the corporate record	Permanent preservation / archive review	Secure Trust governance repository
Constitution Written scheme of delegation		Life if the Academy	Secure disposal	Academy Lock Up
Special resolutions to amend the constitution		Life of the Trust; retain permanently where part of the corporate record	Permanent preservation / archive review	Secure Trust governance repository
Trustees – appointment	Personal Information	Life of appointment plus 6 years	Secure disposal	Academy Lock Up
Trustees– disqualification	Personal Information	15 years	Secure disposal	Academy Lock Up
Trustees– termination of office	Personal Information	6 years	Secure disposal	Academy Lock Up

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Agendas for Governing Body Meetings	Meeting may deal with confidential matters	10 years where part of the formal meeting record; otherwise 3 years	Secure disposal or archive review	Secure governance repository
Minutes of the Governing Body Meeting	Meeting may deal with confidential matters	10 years from date of meeting; signed principal record may be retained permanently	Secure disposal or archive review	Secure governance repository
Principal Set signed		Permanent		Academy Lock Up- then offered to County Archives Service
Inspection Copies (held by Clerk)		3 years	Secure disposal	Academy Lock Up
Reports presented to the Governing Body	Meeting may deal with confidential matters	6 years	Secure disposal	Academy Lock Up
Meeting paper related to AGM		10 years from date of meeting	Secure disposal or archive review	Secure governance repository
Instruments of Government including articles of association		Permanent		Academy Lock Up- then offered to County Archives Service
Trusts and endowments managed by Governing Body		Permanent		Academy Lock Up- then offered to County Archives Service

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Action Plans created by the Governing Body		3 years	Secure disposal	Academy Lock Up
Policies created by the Governing Body		3 years	Secure disposal	Academy Lock Up
Complaints dealt with by the Governing Body	Staff/parent/child identity	6 years	Secure disposal	Academy Lock Up
Governors Annual Reports	Meeting may deal with confidential matters	10 years	Secure disposal	Academy Lock Up
Proposals to change the status of a maintained school		3 years	Secure disposal	Academy Lock Up
Log books or records of activity	Reference to pupils or staff	6 years	Historical Value- may be kept	Academy Lock Up
Minutes of SMT meetings or other administative meetings	Reference to pupils or staff	3 years	Secure Disposal	Academy Lock Up or locked school cupboard
Reports created by HT or SMT	Reference to pupils or staff	3 years	Secure Disposal	Academy Lock Up or locked school cupboard
Records created by HT or SMT including subject leads	Reference to pupils or staff	6 years	Secure Disposal	Academy Lock Up
Correspondance created by HT or SMT	Reference to pupils or staff	3 years	Secure Disposal	Academy Lock Up or locked school cupboard
Proffessional Development Plans	Reference to pupils or staff	6 years	Secure Disposal	Academy Lock Up
School Improvement Plans	Reference to pupils or staff	3 years	Secure Disposal	Academy Lock Up or locked school cupboard
General Files		6 years	Secure Disposal	Academy Lock Up
School Brochure/Prospectus		3 years	Shredding	Locked Filing Unit

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Circulars/Memo to staff, parents or pupils		1 year	Shredding	Locked Filing Unit
Newsletters		1 year	Shredding	Locked Filing Unit
Vistors Books and Signing in Sheets	Staff/Parent/Pupil/Vistor Info	6 years	Secure Disposal	Academy Lock Up
PTA or other parent associations		6 years	Secure Disposal	Academy Lock Up

2. Legislation and Guidance from DFE

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Transfer Sheets	yes	6 years	Secure Disposal	Academy Lock Up/Locked Filing Unit
Attendance Returns	yes	6 years	Secure Disposal	Academy Lock Up/Locked Filing Unit
School Census Returns		6 years	Secure Disposal	Academy Lock Up/Locked Filing Unit
Circulars from Government/LA		Life of use	Secure Disposal	
Ofsted reports		Life of report	Secure Disposal	Filed
Returns to Central Government/LA		6 years	Secure Disposal	Academy Lock Up/Locked Filing Unit

3. Pupils

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Pupil's Educational record	Yes	Until the pupil leaves; transfer to the next school. Keep MIS data for 2 terms after	Secure transfer; then secure deletion from live MIS after required reporting period	ARBOR / secure pupil file

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
		leaving for census purposes		
Exam results	Yes	Add to pupil file	Transfer with pupil	ARBOR
Child Protection Information	Yes	Until the child's 25th birthday; records relating to child sexual abuse until the child's 75th birthday	Transfer separately and securely to the next school; securely dispose at end of retention	CPOMS / separate secure safeguarding file
Attendance Registers	Yes	6 years	Secure Disposal	Academy Lock Up
Correspondence about attendance	Yes	6 years	Secure Disposal	Academy Lock Up
SEN Education Plans	Yes	Transfer with the pupil; retain any Trust copy only while required for legal, operational or safeguarding purposes	Secure transfer or secure disposal	ARBOR / approved secure SEND system

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
EHCP	Yes	Transfer with the pupil; retain any Trust copy only while required for legal, operational or safeguarding purposes	Secure transfer or secure disposal	ARBOR / approved secure SEND system
SEN records	Yes	Transfer with the pupil; retain any Trust copy only while required for legal, operational or safeguarding purposes	Secure transfer or secure disposal	ARBOR / approved secure SEND system
Accessibility Strategy	Yes	Life of plan plus 6 years	Secure disposal	Secure school or Trust repository
Curriculum returns		6 years	Secure Disposal	Academy Lock Up/Locked Cupboard
SATs Results	Yes	Add to pupil File- copies 6 years	Secure Disposal	Academy Lock Up/Locked Cupboard

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
SATs Papers	Yes	1 year	Secure Disposal	Academy Lock Up/Locked Cupboard
Contextual Data	Yes	6 years	Secure Disposal	Academy Lock Up/Locked Cupboard
Self Evaluation Records	Yes	6 years	Secure Disposal	Academy Lock Up/ Locked Cupboard
Schemes of Work		1 year	Secure Disposal	Locked Cupboard
Lesson plans		1 year	Secure Disposal	Locked Cupboard
Timetables		1 year	Secure Disposal	Locked Cupboard
Class record logs		1 year	Secure Disposal	Locked Cupboard
Mark Books or Records		1 year	Secure Disposal	Locked Cupboard
Record of Homework		1 year	Secure Disposal	Locked Cupboard
Pupils' work		6 months	Front covers removed-shredded	Locked Cupboard
Questionnaires	Yes	6 years	Secure Disposal	Academy Lock Up
Dinner Register		6 years	Secure Disposal	Academy Lock Up
School Meals Summer Sheets		6 years	Secure Disposal	Academy Lock Up

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Records to obtain approval for Educational Visit Outside		10 years from date of visit	Secure disposal; retain incident-related records in pupil record	Approved visits system / secure storage
Parental Consent Forms- No major accidents	yes	Until conclusion of visit, unless needed for an incident, claim or legal hold	Secure disposal	Approved visits system / secure storage
Parental Consent Forms- Major accident	yes	Retain with the incident report in the pupil record, subject to the applicable pupil-record period	Secure disposal at end of applicable period	Secure pupil record
Group registers	yes	6 years	Secure Disposal	Academy Lock Up
Contact Data Sheets	yes	1 year	Secure Disposal	Locked Filing Unit
Reports for outside agencies	yes	6 years	Secure Disposal	Academy Lock Up
Records relating to creation of Admissions Policy		3 years	Secure Disposal	Academy Lock Up or Locked Cupboard

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Admissions- successful	Yes	6 years from admission date	Secure disposal	ARBOR / secure admissions storage
Admissions- unsuccessful/appeal	Yes	Until the appeal process is complete, then normally 1 year; retain longer only where a documented legal need applies	Secure disposal	Secure admissions storage
Register of Admissions	Yes	6 years from admission date	Secure disposal	ARBOR / secure admissions storage
Proof of address for admissions	Yes	1 year	Secure Disposal	Locked Filing Unit
Successful Supplementary Information- religion etc.	Yes	added to pupil file	Secure Disposal	Locked Filing Unit/ARBOR
Unsuccessful Supplementary Information- religion etc.	Yes	After appeals process complete	Secure Disposal	Locked Filing Unit
PAN reports	Yes	6 years	Secure Disposal	Academy Lock Up or Locked Cupboard

4. Staff

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Staff Personal File	Yes	Employment + 6 years	Secure Disposal	Locked Filing Unit
Timesheets, sick pay, maternity pay	Yes	6 years	Secure Disposal	Locked Filing Unit/Academy Lock Up
Annual Appraisal/Performance Management	Yes	6 years	Secure Disposal	Locked Filing Unit
Allegation of CP against Staff member	Yes	Until the staff member's normal retirement age or 10 years from the date of the allegation, whichever is later (including unfounded allegations)	Secure disposal	Restricted HR / safeguarding storage
Malicious unfounded allegation of CP- staff	Yes	Remove where the allegation is substantiated as malicious or intentionally false, subject to	Secure disposal with documented authorisation	Restricted HR / safeguarding storage

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
		safeguarding and legal advice and any litigation hold		
Disciplinary- Informal / Oral	Yes	1 year	Secure Disposal	Locked Filing Unit
Disciplanary - Formal Reviews	Yes	1 year	Secure Disposal	Locked Filing Unit
Disciplinary- 1st written	Yes	1 year	Secure Disposal	Locked Filing Unit
Disciplinary- Final	Yes	18 months	Secure Disposal	Locked Filing Unit
Disciplinary - case not found	Yes	Conclusion of case	Secure Disposal	Locked Filing Unit
Staff Attendance- Informal	Yes	Live for 1 year + Employment	Secure Disposal	Locked Filing Unit
Staff Attendance- 1st written	Yes	Live for 1 year + Employment	Secure Disposal	Locked Filing Unit
Staff Attendance- Final written	Yes	Live for 1 year + Employment	Secure Disposal	Locked Filing Unit
Records for HT appointment	Yes	6 years	Secure Disposal	Locked Filing Unit
Records for staff appointments-successful	Yes	Add to personal file +6 months	Secure Disposal	Locked Filing Unit

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Records for staff appointments- unsuccessful	Yes	6 months after appointment, unless required for a complaint, claim or legal hold	Secure disposal	Restricted HR system
Pre-employment vetting info	Yes	Normally 6 months from recruitment; record the outcome on the single central record	Secure disposal	Restricted HR system
Proof of ID	Yes	Life of employment in personal file		Locked Filing Unit

5. Finance

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Maternity Pay Records	Yes	3 years after the end of the tax year in which the maternity pay period ends	Secure disposal	Secure payroll / finance system
Records of Retirement Benefits	Yes	Minimum 6 years from the end of the year in which the accounts were signed	Secure disposal	Secure payroll / finance system
Employers Liability Insurance		Permanent	Offered to County Archives	Academy Lock Up
Inventories of furniture/equipment		6 years	Secure Disposal	Academy Lock Up
Burglary/theft/vandalism reports		6 years	Secure Disposal	Academy Lock Up
Annual Accounts		At least 6 years from financial year end; signed statutory accounts	Secure disposal or permanent preservation	Secure Trust finance repository

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
		retained permanently as the corporate record		
Loans and Grants		12 years	Secure Disposal	Academy Lock Up
Records of school budget		6 years	Secure Disposal	Academy Lock Up
Invoices, receipts, order books, requisitions, delivery notices		6 years	Secure Disposal	Academy Lock Up
Collection and banking of money		6 years	Secure Disposal	Academy Lock Up
Records of debt collection		6 years	Secure Disposal	
Management of contracts		6 years from last payment; 12 years where executed as a deed	Secure disposal	Secure Trust contract repository
School Fund- cheque books		6 years	Secure Disposal	Academy Lock Up
School Fund- paying in books		6 years	Secure Disposal	Academy Lock Up
School Fund- ledgers		6 years	Secure Disposal	Academy Lock Up

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
School Fund- invoices		6 years	Secure Disposal	Academy Lock Up
School Fund- receipts		6 years	Secure Disposal	Academy Lock Up
School Fund- bank statements		6 years	Secure Disposal	Academy Lock Up
School Meals Registers + FSM	Yes	6 years	Secure Disposal	Academy Lock Up
School Meals summaries and records	Yes	6 years	Secure Disposal	Academy Lock Up

6. Health & Safety

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Health and Safety Policies		6 Years	Secure Disposal	Locked Storage Unit/Academy Lock Up
Health and Safety Risk Assessments		Life of assessment plus 6 years	Secure disposal	Approved compliance system / secure storage
Records of accident/injury at work	Yes	3 years from date of accident, or longer where required for a child record, claim or legal hold	Secure disposal	Approved H&S system / secure storage

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Accident Reporting-Adults	Yes	3 years from date of accident	Secure disposal	Approved H&S system / secure storage
Accident Reporting- Children	Yes	Retain in the pupil record; apply the relevant pupil-record period	Secure disposal at end of applicable period	Approved H&S system / secure pupil record
COSHH		Exposure monitoring records: 5 years; health surveillance records: 40 years	Secure disposal	Approved compliance system / secure storage
Asbestos		Asbestos management records: life of premises/use plus relevant successor transfer; exposure health-surveillance records: 40 years	Secure transfer or secure disposal following specialist advice	Approved compliance system / secure estates storage

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Radiation		50 Years	Secure Disposal	Locked Storage Unit/Academy Lock Up
Fire Precaution Logs		Life of risk assessment or log plus 6 years	Secure disposal	Approved compliance system / secure storage
Legionnaire		6 Years	Secure Disposal	Locked Storage Unit/Academy Lock Up
CCTV footage	Yes	Normally 31 days or the shortest configured period necessary; preserve relevant footage for an incident, request, investigation or legal hold	Secure automatic overwrite/deletion; document exported copies	Restricted CCTV system
Accessibility Plans	Yes	Life of plan plus 6 years	Secure disposal	Secure school or Trust repository
Title Deeds		Permanent		Academy Lock Up
Property Plans		Permanent		Academy Lock Up
Leases of property by or to the Academy		6 years after expiry of lease	Secure Disposal	Academy Lock Up/Locked Filing Unit

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Letting records		6 years	Secure Disposal	Academy Lock Up/ Locked Filing Unit
Records of maintenance of the school by contractors		6 years	Secure Disposal	Academy Lock Up/ Locked Filing Unit
Records of maintenance of the school by Academy		6 years	Secure Disposal	Academy Lock Up/ Locked Filing Unit

7. Daycare

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Minutes of Senior Management Meetings		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Reports Created by Daycare Manager		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Correspondence created by Daycare Manager		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Professional Development Plans		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
School Improvement/Action Plans		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Health and Safety Risk Assessments		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Accident Reporting- adults		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Accident Reporting- children		25 years	Secure Disposal	Academy Locker/Locked Filing Unit
Staff Personal File		Life of employment + 6 years	Secure Disposal	Academy Locker/ Locked Filing Unit
Timesheets		6 years	Secure Disposal	Academy Locker/ Locked Filing Unit
Appraisal/Performance Management		6 years	Secure Disposal	Academy Locker/Locked Filing Unit
Signing In sheets and visitors books		6 years	Secure Disposal	Academy Locker/Locked Filing Unit

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
Records of staff/parent circulars		1 year	Shredded	Locked Filing unit
Newsletters		1 year	Shredded	Locked Filing Unit
Register of admissions		6 years	Secure Disposal	Academy Locker
Proof of address/ID		1 year	Secure Disposal	Locked Filing Unit
Finance-cheque books		6 years	Secure Disposal	Academy Locker
Paying in books		6 years	Secure Disposal	Academy Locker
Credit Card records		6 years	Secure Disposal	Academy Locker
Invoices		6 years	Secure Disposal	Academy Locker
Requisitions		6 years	Secure Disposal	Academy Locker
Receipts		6 years	Secure Disposal	Academy Locker
Bank Statements		6 years	Secure Disposal	Academy Locker
Free school meal registers		6 years	Secure Disposal	Academy Locker
Child Protection records		Transfer separately with child;	Secure transfer or secure disposal	CPOMS / separate secure safeguarding file

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
		until 25th birthday, or 75th birthday where relating to child sexual abuse		
SEN records		Transfer with child; retain local copy only for documented legal or operational need	Secure transfer or secure disposal	Approved secure system
Attendance registers		6 years	Secure Disposal	Academy Locker
Pupil Data		6 years	Secure Disposal	Academy Locker
Self evaluation records		6 years	Secure Disposal	Academy Locker
Nappy sheets		6 months	Shredded	Daycare
Sleep sheets		6 months	Shredded	Daycare
Records of Daycare trips visits off the premises		10 years from date of visit; incident records	Secure disposal	Approved visits system / secure storage

Basic File Description	Data Protection Issues	Minimum Retention Period	Action After Retention	Storage
		retained with child record		
Parent consent forms for trips and visits		Conclusion of trip	Shredded	
Planning		1 year	Shredded	Daycare
Schemes of Work		1 year	Shredded	Daycare
Timetables		1 year	Shredded	Daycare
Pupil Record Books/Observations		1 year	Shredded	Daycare
Learning Journals		1 year	Given to parents/carers or shredded	Daycare

Records Management Policy

The School recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Relationships with existing policies

Legal framework

This policy has due regard to legislation including, but not limited to, the following:

- UK General Data Protection Regulation (UK GDPR), as amended
- Data (Use and Access) Act 2025
- Freedom of Information Act 2000
- Limitation Act 1980
- Data Protection Act 2018

This policy also has due regard to the following guidance:

- DfE (updated July 2026) “Data protection in schools”, including record keeping and management
- DfE “Data protection in schools” guidance and resources
- DfE “Keeping children safe in education 2026” and “Working together to safeguard children 2026”
- DfE “Record keeping and retention information for academies and academy trusts” and Academy Trust Handbook 2026
- Information and Records Management Society (IRMS) Schools Toolkit and current retention schedule
- The National Archives guidance on records management, disposal and archives for schools
- ICO guidance on storage limitation, records of processing activities, security and disposal
- Freedom of Information Code of Practice issued under section 46 of the Freedom of Information Act 2000

1 Scope of the policy

This policy applies to all records created, received or maintained by staff of the school in the course of carrying out its functions.

1.2 Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

1.3 A small percentage of the school's records will be selected for permanent preservation as part of the institution's archives and for historical research.

2 Responsibilities

2.1 The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Head of the School.

2.2 The person responsible for records management in the school will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and timely.

2.3 Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines.

2.4 The Data Protection Officer advises and monitors compliance. Headteachers and central directors remain responsible for ensuring that records in their areas are accurate, access-controlled, retained for the correct period and disposed of securely. The schedule must be reviewed annually and whenever law, guidance, systems or Trust functions change.