

**Blessed Holy Family
Catholic Academy Trust**



Record Retention Policy

**‘Christ at our centre,
inspiring our pursuit of excellence’**

CONTEXT

The Blessed Holy Family Catholic Academy Trust is committed to the development of the whole person as a key part of our Catholic mission. We believe that all are of equal worth, created in Christ's image. Our actions are governed by our living testament to the Gospel values of justice, fairness, respect and equality. We place high value on the importance of a broad and balanced curriculum which excites, engages and enthuses learning across all of the schools that make up the Trust. We recognise the importance of activities and educational visits in enriching the curriculum. We wish to ensure that no pupil will be disadvantaged in relation to others.

This policy applies to all members of the Blessed Holy Family Catholic Academy Trust:

- St. George's Roman Catholic Primary School
 - St. John Fisher Roman Catholic Primary School
 - St. Joseph's Roman Catholic Primary School
 - The Sacred Heart Language College
 - Blessed Holy Family Catholic Academy Trust
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Commitment to equality:

We are committed to providing a positive working environment which is free from prejudice and unlawful discrimination and any form of harassment, bullying or victimisation. We have developed a number of key policies to ensure that the principles of Catholic Social Teaching in relation to human dignity and dignity in work become embedded into every aspect of school life and these policies are reviewed regularly in this regard.

The Trust has a responsibility to maintain its records and record keeping systems. When doing this, the Trust will take account of the following factors: -

- The most efficient and effective way of storing records and information;
- The confidential nature of the records and information stored;
- The security of the record systems used; Privacy and disclosure; and Their accessibility.

This policy does not form part of any employee's contract of employment and is not intended to have contractual effect. It does, however, reflect the Trust's current practice, the requirements of current legislation and best practice and guidance. It may be amended by the Trust from time to time and any changes will be notified to employees within one month of the date on which the change is intended to take effect. The Trust may also vary any parts of this procedure, including any time limits, as appropriate in any case.

This policy is informed using the IRMS (Information and Records Management Toolkit for Schools, version 6)

1. Data Protection

- 1.1. This Policy sets out how long employment related and pupil data will normally be held by us and when that information will be confidentially destroyed in compliance with the terms of the General Data Protection Regulation (GDPR) and the Freedom of Information Act 2000. Following Brexit, Regulation (EU) 2016/679, General Data Protection Regulation (GDPR) is retained EU law and known as UK GDPR. The UK GDPR sits alongside an amended version of the Data Protection Act 2018 that relate to general personal data processing, powers of the Information Commissioner and sanctions and enforcement. The GDPR as it continues to apply in the EU is known as EU GDPR.
- 1.2. Data will be stored and processed to allow for the efficient operation of the Trust. The Trust's Data Protection Policy outlines its duties and obligations under the GDPR.

2. Retention Schedule

- 2.1. Information (hard copy and electronic) will be retained for at least the period specified in the attached retention schedule. When managing records, the Trust will adhere to the standard retention times listed within that schedule.
- 2.2. Paper records will be regularly monitored by the Headteacher and School Business Manager or Office Manager
- 2.3. Electronic records will be regularly monitored by the Headteacher and School Business Manager or Office Manager.
- 2.4. The schedule is a relatively lengthy document listing the many types of records used by the Schools within the Trust and the applicable retention periods for each record type. The retention periods are based on business needs and legal requirements.

3. Destruction of Records

- 3.1. Where records have been identified for destruction they should be disposed of in an appropriate way. All the information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such a potential litigation, complaints or grievances.

- 3.2. All paper records containing personal information, or sensitive policy information should be shredded before disposal where possible. All other paper records should be disposed of by an appropriate waste paper merchant. All electronic information will be deleted.
- 3.3. The Schools within the Trust should maintain a database of records which have been destroyed and who authorised their destruction. When destroying documents, the appropriate staff member should record in this list at least.
- File reference (or other unique identifier);
 - File title/description;
 - Number of files;
 - Name of the authorising Officer;
 - Date destroyed or deleted from system; and Person(s) who undertook destruction.

4. Record Keeping of Safeguarding

- 4.1. Any allegations made that are found to be malicious must not be part of the personnel records.
- 4.2. For any other allegations made, the Trust must keep a comprehensive summary of the allegation made, details of how the investigation was looked into and resolved and any decisions reached. This should be kept on the personnel files of the accused.
- 4.3. Any allegations made of sexual abuse should be preserved by the Trust for the term of an inquiry by the Independent Inquiry into Child Sexual Abuse. All other records (for example, the personnel file of the accused) should be retained until the accused has reached normal pension age or for a period of 10 years from the date of the allegation if that is longer. Guidance from the Independent Inquiry Child Sexual Abuse states that prolonged retention of personal data at the request of an Inquiry would not contravene data protection regulation provided the information is restricted to that necessary to fulfil potential legal duties that a Trust may have in relation to an Inquiry.
- 4.4. Whilst the Independent Inquiry into Child Sexual Abuse is ongoing, it is an offence to destroy any records relating to it. At the conclusion of the Inquiry, it is likely that an indication regarding the appropriate retention periods of the records will be made.

5. Archiving

- 5.1. Where records have been identified as being worthy of preservation over the longer term, arrangements should be made to transfer the records to the archives. A database of the records sent to the archives is maintained by the School Business Manager or Office Manager. The appropriate staff member, when archiving documents should record in this list the following information: -
- File reference (or another unique identifier);
 - File title/description;
 - Number of files; and
 - Name of the authorising officer.

6. Transferring Information to Other Media

- 6.1. Where lengthy retention periods have been allocated to records, members of staff may wish to consider converting paper records to other media such as digital media or virtual storage centres (such as cloud storage). The lifespan of the media and the ability to migrate data where necessary should always be considered.

7. Transferring Information to Another Trust

- 7.1. We retain the Pupil's educational record whilst the child remains at the Trust. Once a pupil leaves the Trust, the file should be sent to their next place of education. The responsibility for retention then shifts onto the next education establishment. We retain the file for a year following transfer in case any issues arise as a result of the transfer.
- 7.2. We may delay destruction for a further period where there are special factors such as potential litigation.

8. Responsibility and Monitoring

- 8.1. The Headteacher has primary and day to day responsibility for implementing this Policy. The Data Protection Officer, in conjunction with the Trust is responsible for monitoring its use and effectiveness and dealing with any queries on its interpretation. The Data Protection officer will consider the suitability and adequacy of this policy and report improvements directly to management.
- 8.2. Internal control systems and procedures will be subject to regular audits to provide assurance that they are effective in creating, maintaining and removing records.
- 8.3. Management at all levels are responsible for ensuring those reporting to them are made aware of and understand this Policy and are given adequate and regular training on it.

9. Emails

- 9.1. Emails accounts are not a case management tool in itself. Generally, emails may need to fall under different retention periods (for example, an email regarding a health and safety report will be subject to a different time frame to an email which forms part of a pupil record). It is important to note that the retention period will depend on the content of the email and it is important that staff file those emails in the relevant areas to avoid the data becoming lost.

10. Pupil Records

- 10.1. All schools, with the exception of independent schools, are under a duty to maintain a pupil record for each pupil. If a child changes schools, the responsibility for maintaining the pupil record moves to the next school. We retain the file for a year following transfer in case any issues arise as a result of the transfer.

RETENTION SCHEDULE

FILE DESCRIPTION	RETENTION PERIOD
Human Resources/ Employment Records	
All records leading up to the appointment of a headteacher	Unsuccessful attempts – date of appointment plus 6 months. Add to personnel file and retain until end of appointment + 6 years except in cases of negligence or claims of child abuse then at least 15 years

All records leading up to the appointment of a member of staff/governor - unsuccessful candidates	Date of appointment of successful candidate + 6 months
Pre-employment vetting information – DBS Checks – successful candidates	Application forms, references and other documents for the duration of the employee's employment + 6 years
Job applications and interview records of successful candidates	6 years after employment ceases
Written particulars of employment, contracts of employment and changes to terms and conditions	6 years after employment ceases
Right to work documentation including identification documents	6 years after employment ceases
Immigration checks	Two years after the termination of employment
DBS checks and disclosures of criminal records forms	As soon as practicable after the check has been completed and the outcome recorded (i.e. whether it is satisfactory or not) unless in exceptional circumstances (for example to allow for consideration and resolution of any disputes or complaints) in which case, for no longer than 6 months.
Change of personal details notifications	No longer than 6 months after receiving this notification
Emergency contact details	Destroyed on termination
Personnel records	While employment continues and up to six years after employment ceases unless the member of staff is part of any case which falls under the terms of reference of IICSA. If this is the case, then the file will need to be retained until the IICSA enquiries are complete
Annual Appraisal/assessment records	Current year + 6 years
Sickness Absence Monitoring	<p>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.</p> <p>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 records 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.</p>

Annual leave records	Six years after the end of tax year they relate to or possibly longer if leave can be carried over from year to year
Consents for the processing of personal and sensitive data	For as long as the data is being processed and up to 6 years afterwards
Working Time Regulations: <ul style="list-style-type: none"> • Opt out forms • Records of compliance with WTR 	<ul style="list-style-type: none"> • Two years from the date on which they were entered into • Two years after the relevant period
Staff Training – where the training leads to continuing professional development	Length of time required by the professional body
Staff training where it relates to safeguarding or other child related training	Date of the training plus 40 years reflecting that the IICSA may wish to see training records as part of an investigation
Disciplinary and Grievance Processes	
Records relating to any allegation of a child protection nature against a member of staff	Until the person's normal retirement age or 10 years from the date of the allegation (whichever is the longer) then review. Note: Allegations that are found to be malicious should be removed from personnel files. If found they are to be kept on the file and a copy provided to the person concerned UNLESS the member of staff is part of any case which falls under the terms of the IICSA. If this is the case, then the file will need to be retained until IICSA enquiries are completed
Disciplinary proceedings	Oral warning – Date of warning + 6 months Written warning, level 1 – Date of warning + 6 months Written warning, level 2 – Date of warning + 12 months Final warning – Date of warning + 18 months Case not found – if the incident is related to child protection, see above, if not dispose of when case concludes
Payroll and Pensions	
Absence Record	Current year + 3 years
Batches	Current year + 6 years
Bonus Sheets	Current year + 3 years
Car allowance claims	Current year + 3 years
Car loans	Completion of loan + 6 years

Car mileage output	Current year + 6 years
Elements	Current year + 2 years

Income tax form P60	Current year + 6 years
Insurance	Current year + 6 years
Maternity Payment	Current year + 3 years
Members Allowance Register	Current year + 6 years
National Insurance – schedule of payments	Current year + 6 years
Overtime	Current year + 3 years
Part time fee claims	Current year + 6 years
Pay packet receipt by employee	Current year + 2 years
Payroll Awards	Current year + 6 years
Payroll – gross/net weekly or monthly	Current year + 6 years
Payroll reports	Current year + 6 years
Payslips – copies	Current year + 6 years
Pension payroll	Current year + 6 years
Personal bank details	Until superseded + 3 years
Sickness records	Current year + 3 years
Staff Returns	Current year + 3 years
Superannuation adjustments	Current year + 6 years

Superannuation reports	Current year + 6 years
Tax forms P6/P11/P11D/P35/P45/P46/P48	Current year + 6 years
Time sheets/clock cards/flexitime	Current year + 3 years
Financial and Payroll Records	
Pension records	12 years

Retirement benefits schemes – notifiable events (for example, relating to incapacity)	6 years from the end of the scheme year in which the event took place
Payroll and wage records	6 years after end of tax year they relate to
Maternity/Adoption/Paternity Leave records	3 years after end of tax year they relate to
Statutory Sick Pay	3 years after the end of the tax year they relate to
Current bank details	Until updated plus 3 years
Bonus Sheets	Current year plus 3 years
Time sheets/clock cards/flexitime	Current year plus 3 years
Pupil Premium Fund records	Date pupil leaves the provision plus 6 years
National Insurance (schedule of payments)	Current year plus 6 years
Insurance	Current year plus 6 years
Overtime	Current year plus 3 years
Annual accounts	Current year plus 6 years
Loans and grants managed by the Trust	Date of last payment on the loan plus 12 years
All records relating to the creation and management of budgets	Life of the budget plus 3 years
Invoices, receipts, order books and requisitions, delivery notices	Current financial year plus 6 years
Student Grant applications	Current year plus 3 years

Pupil Premium Fund records	Date pupil leaves the Trust plus 6 years
Trust fund documentation (including but not limited to invoices, cheque books, receipts, bank statements etc).	Current year plus 6 years
Free Trust meals registers (where the register is used as a basis for funding)	Current year plus 6 years
Trust meal registers and summary sheets	Current year plus 3 years
Agreements and Administration Paperwork	
Collective workforce agreements and past agreements that could affect present employees	Permanently
Trade union agreements	
Trade union agreements	10 years after ceasing to be effective
Trust Development Plans	3 years from the life of the plan
Visitors Book and Signing In Sheets	6 years
Newsletters and circulars to staff, parents and pupils	1 year (and the Trust may decide to archive one copy)
Minutes of Senior Management Team meetings	Date of the meeting plus 3 years or as required
Reports created by the Head Teacher or the Senior Management Team.	Date of the report plus a minimum of 3 years or as required
Value Added and Contextual Data	Current year + 6 years
Self Evaluation Forms <ul style="list-style-type: none"> • Internal moderation • External moderation 	Academic year plus 1 year Until superseded
Health and Safety Records	
Health and Safety Risk Assessments	Life of the risk assessment plus 3 years provided that a copy of the risk assessment is stored with the accident report if an incident has occurred
Health and safety Policy Statements	Life of policy plus 3 years

Any records relating to any reportable death, injury, disease or dangerous occurrence	Date of incident plus 3 years provided that all records relating to the incident are held on personnel file
Accident reporting records relating to individuals who are under 18 years of age at the time of the incident	Accident book should be retained 3 years after last entry in the book.
Accident reporting records relating to individuals who are over 18 years of age at the time of the incident	Accident book should be retained 3 years after last entry in the book
Control of Substances Hazardous to Health (COSHH)	Date of incident + 40 years
Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos	Last action + 40 years
Process of monitoring areas where employees and persons are likely to have come into contact with radiation. Maintenance records or controls, safety features and PPE	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
Dose assessment and recording	To keep the records made and maintained (or copy) 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
Fire precaution log books	Current year plus 3 years
Health and Safety file to show current state of building including all alterations (wiring, plumbing, building works etc)	Pass to new owner on sale or transfer of building
Financial Management	
Risk Management and Insurance: Employers Liability Insurance Certificate	Closure of the school + 40 years (may be kept electronically)
Asset Management – <ul style="list-style-type: none"> • Inventories of furniture and equipment • Burglary, theft and vandalism report forms 	Current year + 6 years Current year + 6 years

<p>Accounts and Statements (including budget management)</p> <ul style="list-style-type: none"> • Annual accounts • Loans and grants managed by school • All records relating to the creation and management of budgets, including the annual budget statement and background papers • Invoices, receipts, order books and requisitions, delivery notices • Records relating to the collection and banking of monies • Records relating to the identification and collection of debt 	<p>Current year + 6 years Date of last payment + 12 years then review</p> <p>Life of the budget + 3 years</p> <p>Current year + 6 years</p> <p>Current year + 6 years</p> <p>Final payment of debt + 6 years</p>
<p>Pupil Finance</p> <ul style="list-style-type: none"> • Student grant applications • Pupil Premium Fund records • 	<p>Current year + 3 years Date the pupil leaves provision + 6 years</p>
<p>Contract Management</p> <ul style="list-style-type: none"> • All records relating to the management of contracts under seal • All records relating to the management of contracts under signature • Records relating to the monitoring of contracts • 	<p>Last payment on the contract + 12 years</p> <p>Last payment on the contract + 6 years</p> <p>Life of contract + 6 years</p>
<p>School Fund</p> <ul style="list-style-type: none"> • School Fund cheque books • School Fund paying in books • School Fund ledger • School Fund invoices • School Fund receipts • School Fund bank statements • 	<p>Current year + 6 years</p>
<ul style="list-style-type: none"> • School Fund Journey books 	
<p>School Meals Management</p> <ul style="list-style-type: none"> • FSM registers (where the register is used as a basis for funding) • School meals registers • School meals summary sheets 	<p>Current year + 6 years</p> <p>Current year + 3 years</p> <p>Current year + 3 years</p>

Pupil Records	
All records relating to the creation and implementation of the School Admissions Policy	Life of the policy + 3 years and then review
Details of whether admission is successful/unsuccessful	1 year from the date of admission/non-admission (or until the appeals process is completed)
Proof of address supplied by parents as part of the admissions process	Current year plus 1 year
Admissions register	Entries to be preserved for three years from date of entry
Admissions – Secondary – Casual	Current year + 1 year
Supplementary Information Form including additional information such as religion, medical conditions etc	In pupil record for successful admissions For unsuccessful admissions keep until the appeals process is completed
Published Admission Number (PAN) Reports	Current year + 6 years
Pupil Record	Primary – Whilst the child attends the school Secondary – until the child reaches the age of 25 (for TSHLC this is date of leaving + 9 years)
Attendance Registers	3 years from the date of entry
Correspondence relating to any absence (authorised or unauthorised)	Current academic year plus 2 years
Special Educational Needs files, reviews and Education, Health and Care Plan, including advice and information provided to parents regarding educational needs and accessibility strategy	Date of birth of the pupil plus 31 years (Education, Health and Care Plan is valid until the individual reaches the age of 25 years – the retention period adds an additional 6 years from the end of the plan).
Child protection information held on pupil file	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelop and then retained for the same period of time as the pupil file. NOTE: These records will be subject to any instruction given by IICSA

Child protection information held in separate files	DOB 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 Local Authority Social Services record. NOTE: These records will be subject to any instruction given by IICSA
Examination results – Public and Internal	<u>Internal</u> - Add to pupil file. <u>External</u> - Any uncollected certificates should be returned to the examination board after reasonable attempts to contact the pupil have failed.
Examination Results (school's copy)	Current year + 6 years
Curriculum Returns	Current + 3 years
SATS records <ul style="list-style-type: none"> • Results • Examination Papers 	Results should be recorded on the pupil's 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 of the whole year's SATS results. These could be kept of current year + 6 years. The papers should be kept until any appeals or the validation process is complete
Allegations of sexual abuse	For the time period of an inquiry by the Independent Inquiry into Child Sexual Abuse.
Records relating to any allegation of a child protection nature against a member of staff	Until the accused normal retirement age or 10 years from the date of the allegation (whichever is the longer)
Consents relating to Trust activities as part of GDPR compliance (for example, consent to be sent circulars or mailings)	Consent will last whilst the pupil attends the Trust.
Pupil's work	Where possible, returned to pupil at the end of the academic year (provided the Trust have their own internal policy to this effect). Otherwise, the work should be retained for the current year plus 1 year.
Mark books	Current year plus 1 year.

Schemes of work	Current year plus 1 year
Timetable	Current year plus 1 year
Class record books	Current year plus 1 year
Record of homework set	Current year plus 1 year
Photographs of pupils	For the time the child is at the Trust and for a short while after. Please note select images may also be kept for longer (for example to illustrate history of the Trust).
Other Records	
Emails	E-mail is primarily a communications tool, and many cloud email applications are not designed for the secure long term storage of what could be sensitive or personal data. Any emails which form part of another category of record will be saved or printed and retained according to the guidance in this document for that category of record. For example, an email which forms part of a child's record will be printed and saved until the child leaves the Trust. All other emails will not be retained.
CCTV	15 days before they are automatically recorded over. Unless they are required to be held longer due to an ongoing investigation by the Headteacher or police
Privacy notices	Until replaced plus 6 years.
Inventories of furniture and equipment	Current year plus 6 years
All records relating to the maintenance of the Trust carried out by contractors or employees of the Trust	Whilst the building belongs to the Trust.
Records relating to the letting of Trust premises	Current financial year plus 6 years

Parent Teacher Associations and Old Pupils Associations	
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Current year plus 6 years then review
Family Liaison Officers and Home School Liaison Assistants	
Day books	Current year + 2 years, then review

Reports for outside agencies – where the report has been included on the case file created by the outside agency	Whilst child is attending school and then destroy
Referral forms	While the referral is current
Contact data sheets	Current year then review, if contact is no longer active then destroy
Contact database entries	Current year then review, if contact is no longer active, then destroy
Group registers	Current year + 2 years

Management of Governing Body and Trust	
Instruments of Government	Life of the School/Trust
Trusts and Endowments	Life of the School/Trust
Records relating to the election of parent and staff governors not appointed by the governors	Date of election + 6 months
Records relating to the appointment of coopted governors	Provided that the decision has been recorded 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)
Records relating to the election of chair and vice chair	Once the decision has been recorded in the minutes, the records relating to the election can be destroyed.
Scheme of Delegation and terms of reference for committees	Until superseded or whilst relevant. Schools may wish to retain these records for reference purposes in case decisions need to be justified
Meetings Schedule	Current year

Agendas – principal copy	Agenda should be stored with the principal set of minutes for that meeting
Minutes – principal set (signed)	Although generally kept for the life of the organisation, the Trust is only required to make these available for 10 years from the date of the meeting
Reports made to governors' meetings which are referred to in the minutes	Although generally kept for the life of the organisation, the Trust is only required to make these available for 10 years from the date of the meeting
Register of attendance at full GB meetings	Date of last meeting + 6 years
Papers relating to management of the annual parents' meeting	Date of last meeting + 6 years
Agendas – additional copies`	Date of meeting

Records relating to Governor monitoring visits	Date of visit + 3 years
Annual reports required by the DoE	Date of report + 10 years
All records relating to the conversion of schools to Academy status	Life of the organisation
Records relating to complaints made to and investigated by the GB or Headteacher	Major complaints – current year + 6 years If negligence is involved – current year + 15 years If child protection or safeguarding issues are involved – current year + 40 years
Correspondence sent and received by GB or Headteacher	General correspondence should be retained for current year + 3 years
Action Plans created and administered by the GB or Trust	Until superseded or whilst relevant
Policy documents created and administered by the GB or Trust	Until superseded. School should consider keeping all policies relating to safeguarding, child protection or other pupil related issues such as exclusion until the IICSA has issued its recommendations
Records relating to the appointment of a clerk to the GB or Trust	Date of appointment + 6 years
Records relating to the terms of office of serving governors, including evidence of appointment	Date appointment ceases + 6 years
Records relating to governor declaration against disqualification criteria	Date appointment ceases + 6 years
Register of business interests	Date appointment ceases + 6 years

Governors Code of Conduct	This is expected to be a dynamic document; one copy of each version should be kept for the lifetime of the organisation
Records relating to the training required and received by Governors	Date appointment ceases + 6 years
Records relating to the induction programme for new governors	Date appointment ceases + 6 years
Governor personnel files	Date appointment ceases + 6 years

Headteacher and Senior Management Team

Log books of activity in the school maintained by the Head Teacher	Date of last entry in book + 6 years minimum and then only on review
Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	Date of the meeting + 3 years then review annually or as required if not destroyed
Reports created by the Head Teacher or the Management Team	Date of the meeting + 3 years then review annually or as required if not destroyed
Records created by head teachers, deputy head teachers, heads of year and other	Current academic year + 6 years then review annually or as required if not destroyed

members of staff with administrative responsibilities which do not fall under any other category	
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	Current year + 3 years
Professional development plans	These should be held on the individual's personnel record. If not, then termination of employment + 6 years
School Development Plans	Life of the plan + 3 years

Operational Administration

General file series which do not fit under any other category	Current year + 5 years, then review
Records relating to the creation and publication of the school brochure or prospectus	Current academic year + 3 years

Records relating to the creation and distribution of circulars to staff, parents or pupils	Current academic year + 1 year
School Privacy Notice which is sent to parents as part of GDPR compliance	Until superseded + 6 years
Consents relating to school activities as part of GDPR compliance (e.g. consent to be sent circulars or mailings)	Consent will last whilst the pupil attends the school, it can therefore be destroyed when the pupil leaves
Newsletters and other items with a short operational use	Current academic year + 1 year (schools may decide to archive one copy)
Visitor management systems (including electronic systems, visitors' books and signing in sheets)	Last entry in the visitors book + 6 years (in case of claims by parents or pupils about various actions)
Walking bus registers	Date of register + 6 years
Property Management	
Title deeds of properties belonging to the school	These should follow the property unless the property has been registered with the Land Registry
Plans of property belonging to the school	These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold
Leases of Property leased by or to the school	Expiry of lease + 6 years
Records relating to the letting of school premises	Current year + 6 years
Maintenance	
All records relating to the maintenance of the school carried out by contractors	These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold
All records relating to the maintenance of the school carried out by school employees including maintenance log books	These should be retained whilst the building belongs to the school and should be passed on to any new owners if the building is leased or sold
School Trips	
Parental consent forms for school trips where there has been no major incident	Although the consent forms could be retained for Date of Birth + 22 years, the school may wish to complete a risk assessment to assess whether the forms are likely to be required and could make a decision to dispose of the consent forms at the end of the academic year. This is a pragmatic approach and if in doubt the school should seek legal advice.

Parental permission slips for school trips – where there has been a major incident	Date of birth of the pupil involved + 25 years. 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.
Local Authority	
Secondary Transfer Sheets (primary)	Current year + 2 years
Attendance Returns	Current year + 1 year
School Census Returns	Current year + 5 years
Circulars and other information sent from the LA	Operational use
Central Government	
OFSTED reports and papers where a physical copy is held	Life of the report and then review
Returns made to central government	Current year + 6 years
Circulars and other information sent from central government	Operational use

Policy Ratified by Trust Board:

8th February 2024 (Date)

Signed:

James CV

Reviewed by Trust Board:

4th July 2024

James CV

Policy Ratified by Trust Board:

3rd July 2025 (Date)

Signed:

James CV

Next review:

July 2026