



Wise Owl Trust

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GDPR Retention Guideline Schedule

1 Management of the Academy

This section contains retention periods connected to the general management of the Academy. This covers the work of the Governing Body, the Principal and the SLT, the admissions process and operational administration.

Trustees/ Governing Body				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Agenda for Trust or GB meetings	There 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
Minutes of Trust or GB meetings	There may be data protection issues			
- Principal set (signed)	If the meeting is dealing with confidential issues relating to staff		PERMANENT	If the Academy is unable to store these
- Inspection copies			Date of meeting + 3 years	If these minutes contain any sensitive, personal information they must be shredded
Reports presented to the Trust or Governing Body	There may be data protection issues if the report deals with confidential issues relating to staff		Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports then the reports should be kept permanently	SECURE DISPOSAL or retain with the signed set of the minutes



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Trustees/Governing Body, cont'd

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Instruments of Government including Articles of Association	No		PERMANENT	These should be retained in the Academy whilst the Academy is open
Trusts and Endowments managed by the Trust/Governing Body	No		PERMANENT	These should be retained in the Academy whilst the school is open and
Action plans created and administrated by the Trust or Governing Body	No		Life of the action plan + 3 years	SECURE DISPOSAL
Policy documents created and administered by the Trust or Governing Body	No		Life of the policy + 3 years	SECURE DISPOSAL
Records relating to complaints dealt with by the Trust or Governing Body	Yes		Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	SECURE DISPOSAL
Annual Reports created under the requirements of the Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Trust or Governors Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
Proposals concerning the change of status of a maintained Academy including Specialist Status Schools and Academies	No		Date proposal accepted or declined + 3 years	SECURE DISPOSAL



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CEO, Executive Principal, Principals and Senior Leadership Teams

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Log books of activity in the Academy maintained by the CEO, Executive Principal, Principals or Senior Leadership Team	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	SECURE DISPOSAL
Minutes of SLT meetings and the meetings of other internal administrative teams	There may be data protection issues if the minutes refers to individual pupils or members of staff		Date of meeting + 3 years then review	SECURE DISPOSAL
Reports created by the CEO, Executive Principal, Principals or Senior Leadership 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
Records created by the CEO, Executive Principal, Principals, Deputy Principal, 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 + 6 years then review	SECURE DISPOSAL
Correspondence created by the CEO, Executive Principal, Principals, 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		Date of correspondence + 3 years then review	SECURE DISPOSAL
Professional Development Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL
School Development Plans	No		Life of the plan + 3 years	SECURE DISPOSAL



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Admission Process				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
All records relating to the creation and implementation of the Schools Admission Policy	No	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels Dec 2014	Life of the policy + 3 years then review	SECURE DISPOSAL
Admissions – if the admission is successful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels Dec 2014	Date of admission + 1 year	SECURE DISPOSAL
Admissions – if the admission is unsuccessful	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels Dec 2014	Date of admission + 1 year	SECURE DISPOSAL
Register of Admissions	Yes	School attendance Departmental advice for maintained schools, academies and LAs (October 2014)	Every entry in the admission register must be preserved for a period of three years after the date on which the entry was made	REVIEW Schools may wish to consider keeping the admission register permanently as often schools receive enquiries from past pupils to confirm the dates they attend the school



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Admission Process, cont'd

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Proof of address supplied by parents as part of the admissions process	Yes	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels Dec 2014	Current year + 1 year	SECURE DISPOSAL
Supplementary information form including additional information such as religion, medical conditions etc				
For successful admissions			The information should be added to the pupil file	SECURE DISPOSAL
For unsuccessful admissions			Until appeals process completed	SECURE DISPOSAL

Operational Administration

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and publication of the Academy brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL



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Operational Administration, cont'd ...

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
Visitor's Books and Signing in Sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupil Associations	No		Current year + 6 years then REVIEW	SECURE DISPOSAL

2 Human Resources

This section deals with all matters of Human Resources matters within the Academies

Recruitment

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
All records leading upto the appointment of a new CEO, Executive Principal or Principal	Yes		Date of appointment + 6 years	SECURE DISPOSAL
All records leading upto the appointment of a new member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
All records leading upto the appointment of a new member of staff – successful candidate	Yes		Information to be added to the electronic staff personnel file and retained for 6 months Confirmation of appointment details to be retained in file	SECURE DISPOSAL



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Recruitment, cont'd ...

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Pre-employment vetting information – DBS checks	No	DBS Update Service Employer Guide June 2015 Keeping Children Safe in Education, July 2015 (Statutory Guidance from DfE Sections 73, 74)	The Academy does not have to keep copies of DBS certificates. If the Academy does so the copy must NOT be retained for more than 6 months	
Proofs of identity collected as part of the process of checking 'portable' enhanced DBS disclosure	Yes		Where possible these should be checked and a note kept of what was seen and what has been checked. If it is felt necessary to keep copy documentation then the top section only should be placed on the member of staff's personnel file	
Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Yes	An employer's guide to right to work checks (Home Office May 2015)	Where possible these documents should be added to the Staff Personnel file (see below), but if they are kept separately then the Home Office requires that the documentation are kept for termination of Employment plus not less than 2 years	



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Operational Staff Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Staff Personnel Files	Yes	Limitation Act 1980 (Sect.2)	Termination of Employment + 6 yrs	SECURE DISPOSAL
Staff Data collection sheets (for purpose of updating staff personal data)	Yes		No Retention period	Update system and secure disposal
Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
Annual appraisal/assessment records	Yes		Current year + 5 years	SECURE DISPOSAL

Management of Disciplinary and Grievance Processes

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Allegation of a CP nature against a member of staff including where the allegation is unfounded	Yes	<p>“KCSiE Statutory guidance for schools and colleges March 2015”</p> <p>“Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”</p>	Until the person’s normal retirement age or 10 years from the date of the allegation whichever is 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.	SECURE DISPOSAL These records must be shredded
Disciplinary Proceedings <ul style="list-style-type: none"> - Oral warning - Written warning -1 - Written warning -2 - Final warning - Case not found 	Yes		Date of warning + 6 months Date of warning + 6 months Date of warning + 12 months Date of warning + 18 months If the incident is CP related then see above otherwise dispose of at the conclusion of the case	SECURE DISPOSAL (If warnings are placed on personnel files then they must be weeded from the file) SECURE DISPOSAL



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Health and Safety				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
H & S Policy Statements	No		Life of Policy + 3 years	SECURE DISPOSAL
H & S Risk Assessments	No		Life of Risk Assessment + 3 years	SECURE DISPOSAL
Records relating to Accident/ Injury at work	Yes		Date of incident + 12 years in the case of serious accidents a further retention period will need to be applied	SECURE DISPOSAL
Accident Reporting - Adults - Children	Yes	Social Security (Claims & Payments) Regs 1979 Regulation 25, Social Security Admin Act 1992 Sect. 8. Limitation Act 1980	Date of the incident + 6 years Date of the incident + 25 years	SECURE DISPOSAL SECURE DISPOSAL
Control of Substances Hazardous to Health (COSHH)	No	Control of Substances Hazardous to Health Regs 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regs to be kept as if the 2002 Regs had not been made. Regulation 18 (2)	Current year + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees/persons are likely to have come in contact with asbestos	No	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	Last action + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
Fire Precautions log books	No		Current year + 6 years	SECURE DISPOSAL



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Payroll & Pensions

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Maternity Pay Records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year + 3 years	SECURE DISPOSAL
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SECURE DISPOSAL

3 Financial Management of the School

This section deals with all aspects of the financial management of the Trust/Academies including the administration of school meals

Risk Management and Insurance

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Employer's Liability Insurance Certificate	No		Current year + 6 years	SECURE DISPOSAL

Asset Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL



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Accounts and Statements including Budget Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Annual Accounts	No		Current year + 6 years	STANDARD DISPOSAL
Loans and grants managed by the school	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
Student Grant Applications	Yes		Current year + 3 years	SECURE DISPOSAL
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
Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL

Contract Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Records relating to management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
Records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL
Records relating to monitoring of contracts	No		Current + 2 years	SECURE DISPOSAL



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School Fund

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
School Fund – cheque books	No		Current + 6 years	SECURE DISPOSAL
School Fund – paying in books	No		Current + 6 years	SECURE DISPOSAL
School Fund – Ledger	No		Current + 6 years	SECURE DISPOSAL
School Fund – Invoices	No		Current + 6 years	SECURE DISPOSAL
School Fund – Receipts	No		Current + 6 years	SECURE DISPOSAL
School Fund – Bank statements	No		Current + 6 years	SECURE DISPOSAL
School Fund – Journey books	No		Current + 6 years	SECURE DISPOSAL

School Meals Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Free School Meals Register	Yes		Current year + 6 years	SECURE DISPOSAL
School Meals Registers	Yes		Current year + 3 years	SECURE DISPOSAL
School Meals Summary Sheets	No		Current year + 3 years	SECURE DISPOSAL

4 Property Management

This section deals with all aspects of the financial management of the Trust/Academies including the administration of school meals

Property Management

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Title deeds of properties belonging to the Academies	No		PERMANENT – these should follow the property unless the property has been registered with the Land Registry	



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Property Management, cont'd

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Plans of property belonging to the Academies	No		These should be retained whilst the building belongs to the Academy and should be passed onto any new owners if the building is leased or sold	
Leases of property leased by or to the Academies	No		Expiry of lease + 6 years	SECURE DISPOSAL
Records relating to the letting of Academy premises	No		Current financial year + 6 years	SECURE DISPOSAL

Maintenance

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
All records relating to the maintenance of the Academy carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
All records relating to the maintenance of the Academy carried out by Academy employers including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL



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5 Pupil Management

This section includes all records which are created during the time a pupil spends at the Academy. For information about accident reporting see under Health + Safety above.

Pupil's Educational Record				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	Yes	The Education (Pupil Information) (England) Regulations 2005 SI No. 1437		
Primary			Retain whilst the child remains at the Academy	<p>The file should follow the pupil when he/she leaves the Academy. This will include:</p> <ul style="list-style-type: none"> • To another primary school • To a secondary school • To a pupil referral unit • If the pupil dies whilst at the Academy the file should be returned to the LA to be retained for the statutory retention period *
<p>*If the pupil transfers to an independent school, transfers to home schooling or leaves the country, the file should be returned to the LA to be retained for the statutory retention period. Primary Schools do not ordinarily have sufficient storage space to store records for pupils who have not transferred in the normal way. It makes more sense to transfer the record to the LA as it is more likely that the pupil will request the record from the LA</p>				
Examination Results – Pupil copies - Public - Internal	Yes		This information should be added to the pupil file (as above)	All uncollected certificates should be returned to the examination board



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Pupil's Educational Record, cont'd ...

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Child Protection information held on pupil file	Yes	"KCSiE Statutory guidance for schools and colleges March 2015" "Working together to safeguard children. A guide to interagency working to safeguard and promote the welfare of children March 2015"	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	SECURE DISPOSAL – these records MUST be shredded
Child Protection information held in separate files	Yes	"KCSiE Statutory guidance for schools and colleges March 2015" "Working together to safeguard children. A guide to interagency working to safeguard and promote the welfare of children March 2015"	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 LA Social Services record	SECURE DISPOSAL – these records MUST be shredded

Attendance

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Attendance Registers	Yes	School attendance: Departmental advice for maintained schools, academies, independent schools and LAs Oct 2014	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made	SECURE DISPOSAL



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Attendance, cont'd ...

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Correspondence relating to authorised absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL

Special Educational Needs

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Special Educational Needs files, reviews and IEPs	Yes	Limitation Act 1980 (Section 2)	Date of Birth of pupil + 25 years	REVIEW *

*This retention period is the minimum retention period that any pupil file should be kept. Some LAs choose to keep SEN files for a longer period of time to defend themselves in a "failure to provide a sufficient education" case. There is an element of business risk analysis involved in any decision to keep the records longer than the minimum retention period and this should be documented.

Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years (This would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold
Advice and information provided to parents regarding SEN	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years (This would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold
Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years (This would normally be retained on the pupil file)	SECURE DISPOSAL unless the document is subject to a legal hold



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6 Curriculum Management

Statistics and Management Information				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Curriculum Returns	No		Current year + 3 years	SECURE DISPOSAL
Examination results (Schools Copy)	Yes		Current year + 6 years	SECURE DISPOSAL
SATS records	Yes		The SATS 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 Academy 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 The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
- Results	Yes			SECURE DISPOSAL
- Examination papers	Yes			SECURE DISPOSAL
Published Admission Number (PAN) Reports	Yes		Current year + 6 years	SECURE DISPOSAL
Value Added and Contextual Data	Yes		Current year + 6 years	SECURE DISPOSAL
Self-Evaluation Forms	Yes		Current year + 6 years	SECURE DISPOSAL



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Implementation of Curriculum

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Schemes of Work	No		Current + 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
Timetables	No		Current + 1 year	
Class Record Books	No		Current + 1 year	
Mark Books	No		Current + 1 year	
Record of homework set	No		Current + 1 year	
Pupils' Work	No		Where possible pupils' work should be returned to pupil (end of school year). If this is not the Academies policy, then current year + 1 year	SECURE DISPOSAL

7 Extra Curricular Activities

Educational Visits outside the Classroom

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Records created to obtain approval to run an Educational Visit outside the classroom (Primary Schools)	No	Outdoor Educational Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 "Legal Framework and Employer Systems" and Section 4 "Good Practice"	Date of visit + 14 years	SECURE DISPOSAL
Parental consent forms for trips where there has been no major incident	Yes		Conclusion of the trip	Although the consent forms could be retained for DOB + 22 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time



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Educational Visits outside the Classroom, cont'd ...

Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Parental permission slips for trips where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	DOB of the pupil involved in the incident + 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	

Walking Bus

Walking Bus Registers	Yes		Date of register + 3 years. *	SECURE DISPOSAL
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*This takes into account the fact that if there is an incident requiring an accident report/violent incident report the register will be submitted with the accident report and kept for the period of time required for accident reporting

Family Liaison Officers and Home School Liaison Assistants

Day Books	Yes		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	Yes		Whilst child is attending school and then destroy	
Referral forms	Yes		While the referral is current	
Contact data sheets	Yes		Current year then review, if contact is no longer active then destroy	
Contact database entries	Yes		Current year then review, if contact is no longer active then destroy	
Group Registers	Yes		Current year + 2 years	



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8 Central Government and Local Authority

Local Authority				
Basic File Description	Data Protection Issues	Statutory Provisions	Retention Period (Operational)	Action at the end of the administrative life of the record
Secondary Transfer sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
Attendance Returns	Yes		Current year + 1 year	SECURE DISPOSAL
School Census Returns	No		Current year + 5 years	SECURE DISPOSAL
Circulars and other information sent from the LA	No		Operational use	SECURE DISPOSAL
Central Government				
OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL