



# HEDON PRIMARY SCHOOL RETENTION SCHEDULE December 2022

Governors					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Minutes					
<ul style="list-style-type: none"> <li>• <i>Principal set (signed)</i></li> </ul>	No		10 Years	Retain in school for 10 years from date of meeting	Transfer to Archives
<ul style="list-style-type: none"> <li>• <i>Inspection copies</i></li> </ul>	No		Date of meeting + 3 years	DESTROY [If these minutes contain any sensitive personal information]	

				they should be shredded]	
Agendas	No		Date of meeting	DESTROY	
Meeting Schedule	No		Current Year	SHRED	
Reports	No		Date of report + 10 years	Retain in school for 10years from date of meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Attendance registers for full governing body board meetings	Yes		Last meeting +6years	Retain in school for 6 years from date of meeting	SHRED
Annual Parents' meeting papers	No		Date of meeting + 6 years	Retain in school for 6 years from date of meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Instruments of Government	No		Permanent	Retain in school whilst school is open	Transfer to Archives when the school has closed
Scheme of delegation and terms of reference for committees	No		Until superceded		Offer to local archive, otherwise SHRED
Trusts and Endowments	No		Permanent	Life of school	Transfer to Archives
Action Plans	No		Until superceded	DESTROY	It may be appropriate to offer to the Archives for a sample to be taken if the school has been through a difficult period
Policy documents	No		Expiry of policy	Retain in school whilst policy is operational (this includes if the expired policy is part of a past decision making process)	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

Complaints files	Yes		Major complaints- Current year +6 years Negligence involved – Current year +15 years Child Protection or safeguarding issues: Current year +40 years	Retain in school for the period stated. Review for further retention in the case of contentious disputes Destroy routine complaints	
Annual Reports required by the Department for Education and Skills	No	Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002.SI 2002 No 1171	Date of report + 10 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Proposals for schools to become, or be established as Specialist Status schools	No		Current year + 3 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Unsuccessful candidate election records for parent and staff governors appointments	Yes		Date of elections + 6 months	SHRED	
Appointment records for co- opted governors	Yes		Decision recorded in minutes. Records kept for length of term, unless allegations where records should be retained for 25 years.	SHRED	
Election records for Chair and Vice Chair	Yes		Once decision is minuted, destroy.	SHRED	
Governors monitoring visits	Yes		Date of visit +6 years	SHRED after 6 years.	
Correspondence sent and received by the Governing body or Head teacher	Yea		Current year +3 years	SHRED after 3 years	
Appointment records for clerk to Governing Body			Until appointment ceases + 6 years	SHRED after 6 years	Not held in school - LA keep these records

Appointment records for length served and evidence of appointment			Until appointment ceases + 6 years	SHRED after 6 years	Not held in school - LA keep these records
Governor declaration against disqualification criteria			Until appointment ceases + 6 years	SHRED after 6 years	Not held in school - LA keep these records
Register of business interests			Until appointment ceases + 6 years	SHRED after 6 years	
Governors Code of Conduct			A copy of each version should be kept for the life of the school	Keep file	
Training records for Governors			Until appointment ceases + 6 years	SHRED after 6 years	
Induction programme for new Governors			Until appointment ceases + 6 years	SHRED after 6 years	Not held in school - LA keep these records
DBS checks carried out on any member of the Governing Body			Date of check + 6 months	SHRED after 6 months	Note number of SCR
Personnel files			Until appointment ceases + 6 years	SHRED after 6 years	Not held in school - LA keep these records
Action plans by Governing Body and Policy documents			Until superseded. If policies relate to child protection, safeguarding or exclusions etc, until IICSA has issued any recommendations	SHRED	

<b>6.1 Management</b>					
<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>	
Log Books	Yes <sup>1</sup>		Date of last entry in the book + 6 years	Retain in the school for 6 years from the date of the last entry.	Transfer to the Archives
Minutes of the Senior Management Team and other internal administrative bodies	Yes <sup>1</sup>		Date of meeting + 3 years	Retain in the school for 3 years from meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Reports made by the head teacher or the management team	Yes <sup>1</sup>		Date of report + 3 years	Retain in the school for 3 years from meeting	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	Yes <sup>1</sup>		Closure of file + 6 years	DESTROY If these records contain sensitive information they should be shredded	
Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	No		Date of correspondence + 3 years	DESTROY If these records contain sensitive information they should be shredded	
Professional development plans	Yes		Held on personnel records - if not length of employment + 6 years	SHRED	

School development plans	No		Current plan + 3 years	Review	Offer to the Archives
Privacy Notices communicated to parents	No		Until suspended + 6 years		
Newsletters	No		Current year +1 year	SHRED	

<b>6.2 Pupils</b>					
<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>	
Admission Registers	Yes		Date of last entry in the book (or file) + 3 years	Retain in the school for 3 years from the date of the last entry.	Transfer to the Archives
Attendance registers	Yes	School attendance: Departmental advice for maintained schools, Academies, independent schools and local authorities October 2014	Date of register + 3 years	DESTROY [If these records are retained electronically any back up copies should be destroyed at the same time]	
Absence correspondance	Yes	Education Act 1996 Section 7	Academic year + 2 years	SHRED	
Consents relating to GDPR			Until pupil leaves	SHRED	
Pupil record cards	Yes				
<ul style="list-style-type: none"> <li>Primary</li> </ul>			Retain for the time which the pupil remains at the primary school	Transfer to the secondary school (or other primary school) when the child leaves the school. In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service	

				This includes medical condition information.	
<i>LA admissions team maintain admissions records according to retention laws.</i>					
Pupil files	Yes				
<ul style="list-style-type: none"> <li>Primary including Child Protection</li> </ul>		<p>“Keeping children safe in education Statutory guidance for schools and colleges 2018”;  “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2018”</p>	<p>Retain for the time which the pupil remains at the primary school - If on pupil file</p> <p>DOB +25 years if on CPOMS</p>	<p>Transfer to the secondary school (or other primary school) when the child leaves the school.</p> <p>In the case of exclusion it may be appropriate to transfer the record to the Behaviour Service</p>	
<ul style="list-style-type: none"> <li>Special Educational Needs files, reviews and Individual Education Plans</li> </ul>	Yes	<p>Children and Family’s Act 2014; Special Educational Needs and Disability Act 2001 Section 14</p>	<p>DOB of the pupil + 31 year<sup>2</sup></p> <p>Primary forwards all to Secondary for retention.</p>	SHRED	
Letters authorising absence	No		Date of absence + 2 years	SHRED	
Absence books			Current year + 6 years	SHRED	
Examination results	Yes				
<i>Public</i>	No		Add to pupil file	DESTROY	Any certificates left unclaimed should be returned to the

<sup>2</sup> As above

					appropriate Examination Board
<ul style="list-style-type: none"> <li>Internal examination results</li> </ul>	Yes		Add to pupil file	DESTROY	
Any other records created in the course of contact with pupils	Yes/No		Current year + 5 years	Review at the end of 3 years and either allocate a further retention period or DESTROY	
Statement maintained under The Education Act 1996 - Section 324	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	DESTROY unless legal action is pending	
Proposed statement or amended statement	Yes	Special Educational Needs and Disability Act 2001 Section 1	DOB + 30 years	DESTROY unless legal action is pending	
Advice and information to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Closure + 12 years	DESTROY unless legal action is pending	
Accessibility Strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Closure + 12 years	DESTROY unless legal action is pending	
Physical Intervention records	Yes		DOB +75 years	DESTROY unless legal action is pending	
Photographs <ul style="list-style-type: none"> <li>On the school website</li> <li>Printed out</li> <li>On Facebook and Twitter</li> </ul>	Yes		When superseded. When removed from the wall These will fall of the feed on social media platforms but will not be deleted. DOB+25 years	DESTROY unless keeping for historical/legacy/celebration reasons in which case they will be archived.	



- Taken to support/evidence pupil learning					
- Prospectus			When superseded.		

### 6.3 Curriculum

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Curriculum development	No		Current year + 6 years	DESTROY	
Curriculum returns	No		Current year + 3 years	DESTROY	
School syllabus	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Schemes of work	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Timetable	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Class record books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Mark Books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Record of homework set	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Pupils' work	No		Where possible return to pupils. If not Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a new retention period or DESTROY	
Examination results	Yes		Current year + 6 years	DESTROY [These records should be shredded]	

SATS records	Yes		Current year + 6 years Put on file – don't need keep papers except for length of appeals.	DESTROY [These records should be shredded]	
Parental consent slips - no major incident occurred			Can be kept for date of birth of pupil + 22 years, though the school could dispose of earlier if a risk assessment is undertaken and found to be no longer required, if in doubt legal advice can be sought.	SHRED	
Parental consent slips - major incident occurred. Slips to be retained to show that rules had been followed.		Limitation Act 1980 (Section 2)	Date of birth of pupil + 25 years.	SHRED	

**6.5 Personnel**

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Timesheets, sick pay	Yes	Financial Regulations	Current year + 6 years	SHRED	
Absence Records	Yes		"If sick pay is not paid: current year + 3 years Paid: current year + 6 years"	SHRED	
Maternity records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year +3 years	SHRED	
Overtime Records	Yes	Taxes Management Act 1970 Income and Corporation Taxes 1998	Current year +3 years	SHRED	
Time sheets	Yes	Taxes Management Act 1970 Income and Corporation Taxes 1998	Current year +3 years	SHRED	

Staff Personal files	Yes <sup>3</sup>	Limitation Act 1980 (Section 2)	Termination + 6 years If required by IICSA, until enquires are complete	SHRED	N/B Pay related files are also kept by LA payroll service and stored according to retention guidelines.
Interview notes and recruitment records - unsuccessful	Yes		Date of interview + 6 months	SHRED	
Portable Enhanced DBS disclosure proof of identity	Yes		Retained on personnel file	SHRED	
Pre-employment vetting information (including CRB checks) - Unsuccessful  Evidence to work in UK	No	CRB guidelines  An employer's guide to Right to Work Checks (Home Office, May 2015)_	Date of check + 6 months  Date of check +2 years	SHRED [by the designates member of staff]	
Pre-employment vetting information (including CRB checks) - Successful  Evidence to work in UK	No	CRB guidelines  An employer's guide to Right to Work Checks (Home Office, May 2015)_	Length of employment + 6 months  Length of employment +2 years	SHRED [by the designates member of staff]	
Disciplinary proceedings:	Yes		<b>Please note that all these retention periods where the warning relates to child protection issues may change in light of any recommendations made by the Bichard Inquiry.</b>		

<sup>3</sup> These files should be subject to KCC's open file policy where the employees are employed by RECORDS MANAGEMENT SOCIETY OF GREAT BRITAIN as the Local Education Authority.

• <i>Oral warning</i>			Date of warning + 6 years	SHRED If this is placed on a personal file, it must be weeded from the file.	Malicious allegations must be removed from files.
• <i>written warning – level one</i>			Date of warning + 6 years	SHRED If this is placed on a personal file, it must be weeded from the file.	
• <i>written warning – level two</i>			Date of warning + 6 years	SHRED If this is placed on a personal file, it must be weeded from the file.	
• <i>final warning</i>			Date of warning + 6 years	SHRED If this is placed on a personal file, it must be weeded from the file.	
• <i>case not found</i>			Date + 6 years	SHRED	
• <i>Related to Child Protection</i>			Retirement _ 6 years	SHRED	
<i>Records relating to any allegation of a child protection nature against staff member</i>		“Keeping children safe in education Statutory guidance for schools and colleges September 2018”; “Working together to safeguard children. A guide to inter-agency working to safeguard and promote the	"Malicious allegations should be removed from personnel files. Otherwise until staff members' normal retirement age + 10 years. If part of IICSA enquiries then until the enquiries are complete."	SHRED	

		welfare of children 2018"			
Records relating to accident/injury at work	Yes		Date of incident + 12 years	Review at the end of this period. In the case of serious accidents a further retention period will need to be applied	
Annual appraisal/assessment records/capability/ action plans	No	Limitation Act 1980 (Section 2)	Current year + 6years	SHRED	
Salary cards	Yes		Last date of employment + 85 years	SHRED	
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567)	Current year, +3yrs	SHRED	
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes		Current year + 6 years	SHRED	
Staff training records - CPD	Yes		Length of time required by public body	SHRED	
Staff training not related to children e.g. First Aid	Yes		Length of Employment + 6 years	SHRED	

Staff training related to Safeguarding	Yes		Date of training +40 years	SHRED	
Photographs	Yes		Until no longer needed.	Delete or Shred	
Car allowance claims/care milage claims		Taxes Management Act 1970 Income and Corporation Taxes 1998	Current year +3 years	SHRED	



6.4 Health and Safety					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Accessibility Plans		Disability Discrimination Act	Current year + 6 years	DESTROY	
Accident Reporting		Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 Social Security (Claims and Payments) Regulations 1979. SI 1979 No 628 Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628 Social Security Administration Act 1992 Section 8. Social Security (Claims and Payments) Amendment (No 30 Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically			
<ul style="list-style-type: none"> <li>Adults</li> </ul>	Yes		Current year + 3 years	SHRED	
<ul style="list-style-type: none"> <li>Children</li> </ul>	Yes		DOB + 25 years <sup>4</sup>	SHRED	

<sup>4</sup> A child may make a claim for negligence for 7 years from their 18<sup>th</sup> birthday. To ensure that all records are kept until the pupil reaches the age of 25 this retention period has been applied.

<ul style="list-style-type: none"> <li><i>RIDDOR reportable</i></li> </ul>		Date of accident + 3 years		Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12(2)	
Bump reports	Yes		As accident reports above	SHRED	
COSHH		Control of Substances Hazardous to Health Regulations 2002. SI 2002 No 2677 Regulation 11; Records kept under the 1994 and 1999 Regulations to be kept as if the 2002 Regulations had not been made. Regulation 18 (2)	Current year + 40 years	Review [where appropriate an additional retention period may be allocated]	
Incident reports	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 Social Security (Claims and Payments) Regulations 1979. SI 1979 No 628 Social Security (Claims and Payments) Regulations SI 1987 No 1968 Revokes all but Part 1 of SI 1979 No 628 Social Security Administration Act 1992 Section 8. Social Security (Claims and Payments) Amendment (No	"Accident Book: Date of last entry + 3 years Any major incidents: should be held for 25 years"	SHRED	

		30 Regulations 1993 SI 1993 No 2113 Allows the information to be kept electronically			
Ongoing medication records	Yes		Life of child in school +1 year	SHRED	
Short term medication records	Yes		Duration of medication +1 month	SHRED	
Policy Statements			Date of expiry + 3 year	DESTROY	
Risk Assessments			Current year + 3 years	DESTROY	
Process of monitoring of areas where employees and persons are likely to have come in contact with <b>asbestos</b>			Last action + 40 years	DESTROY	
Process of monitoring of areas where employees and persons are likely to have come in contact with <b>radiation</b>			Last action + 2 years	DESTROY	
Fire Precautions log books			Current year + 3 years	DESTROY	

6.5 Administrative					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Employer's Liability certificate			Life of school +40 years	Pass to LA if school closed	
Inventories of equipment and furniture			Current year + 6 years	DESTROY	
Burglary or theft reports			Current year +6 years	Destroy	
General file series			Current year + 5 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
School brochure/prospectus			Current year + 3 years		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Circulars (staff/parents/pupils)			Current year + 1 year	DESTROY	
Newsletters, ephemera			Current year + 1 year	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Visitors' management systems			Current year + 6 years	Review to see whether a further retention period is required	Transfer to Archives
PTA/Old Pupils' Associations			Current year + 6 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

## 6.6 Finance

Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Annual Accounts		Financial Regulations	Current year + 6 years		Offer to the Archives
Loans and grants		Financial Regulations	Date of last payment on loan + 12 years	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Contracts					
<ul style="list-style-type: none"> <li>• under seal</li> </ul>			Contract completion date + 12 years	SHRED	
<ul style="list-style-type: none"> <li>• under signature</li> </ul>			Contract completion date + 6 years	SHRED	
<ul style="list-style-type: none"> <li>• monitoring records</li> </ul>			Current year + 6 or 12 years dependent whether under seal or signature.	SHRED	
Copy orders			Current year + 2 years	SHRED	
Budget reports, budget monitoring etc			Current year + 3 years	SHRED	
Invoice, receipts and other records covered by the Financial Regulations		Financial Regulations	Current year + 6 years	SHRED	
Annual Budget and background papers			Current year + 6 years	SHRED	
Order books and requisitions			Current year + 6 years	SHRED	
Delivery Documentation			Current year + 6 years	SHRED	
Debtors' Records		Limitation Act 1980	Current year + 6 years	SHRED	
School Fund – Cheque books			Current year + 6 years	SHRED	
School Fund – Paying in books			Current year + 6 years	SHRED	
School Fund – Ledger			Current year + 6 years	SHRED	
School Fund – Invoices			Current year + 6 years	SHRED	

School Fund – Receipts			Current year + 6 years	SHRED	
School Fund – Bank statements			Current year + 6 years	SHRED	
School Fund – School Journey books			Current year + 6 years	SHRED	
Applications for free school meals, travel, uniforms etc			Whilst child at school	SHRED	
Student grant applications			Current year + 3 years	SHRED	
Free school meals registers/Pupil premium	Yes	Financial Regulations	Current year + 6 years	SHRED	
School meal registers	Yes		Current + 3 years	SHRED	
Petty cash books		Financial Regulations	Current year + 6 years	SHRED	

<b>6.7 Property</b>					
<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>	
Title Deeds			Permanent	These should follow the property	Offer to Archives
Plans			Permanent	Retain in school whilst operational then	Offer to Archives
Maintenance and contractors		Financial Regulations	Current year + 6 years	DESTROY	
Leases			Expiry of lease + 6 years	DESTROY	
Lettings			Current year + 6 years	DESTROY	
Burglary, theft and vandalism report forms			Current year + 6 years	SHRED	
Maintenance log books			Pass on to new owner	DESTROY	
Contractors' Reports			Current year + 6 years	DESTROY	

6.8 LEA					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
Secondary transfer sheets (Primary)	Yes		Current year + 1 years	SHRED	
Attendance returns	Yes		Current year + 1 year	DESTROY	
Circulars from LEA			Whilst operationally required	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]

6.9 DfES					
Basic file description	Data Prot Issues	Statutory Provisions	Retention Period [operational]	Action at the end of the administrative life of the record	
HMI reports			These do not need to be kept any longer		Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
OFSTED reports and papers			Replace former report with any new inspection report	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]
Returns			Current year + 6 years	DESTROY	
Circulars from DfES			Whilst operationally required	Review to see whether a further retention period is required	Transfer to Archives [The appropriate archivist will then take a sample for permanent preservation]





**6.10 Connexions**

<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>	
Service level agreements			Until superseded	SHRED	
Work Experience agreement			DOB of child + 18 years	SHRED	

**6.11 School Meals**

<b>Basic file description</b>	<b>Data Prot Issues</b>	<b>Statutory Provisions</b>	<b>Retention Period [operational]</b>	<b>Action at the end of the administrative life of the record</b>	
Dinner Register			Current year + 3 years	SHRED	
School Meals Summary Sheets			Current year + 3 years	SHRED	