



Disposal of Records Schedule

April 2019

Approved by: *W.Blundell*

Date: 26.11.2019

Last reviewed on:

Next review due by:

In conjunction with the Management of School Records Policy, the following schedule for disposal or agreed retention of documents which will be in addition to the Legal / Statutory Guidance in the Policy - for example SEN documents as mentioned in the policy:

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

Initial disposal will commence on or about 1 April 2019 following review of the schedule by the GDPR Focus Group and agreed by the Governing Body. This will include all hard copies; files on the Network and documents held on the Website.

This will be the foundation for keeping all records and documentation for the agreed periods of time and disposal thereafter. The schedules will be reviewed termly by the GDPR Focus Group and Governing Body.

Astley Park School – Disposal of School Records Schedule - April 2019

	Document	Notes	Date Disposed
1.1.1	Agenda for Governing Body Meetings	All additional copies other than master set pre-Sept 2018	
1.1.2	Minutes of the Governing Body meetings	All additional copies other than master set pre-Sept 2018	
1.1.3	Reports presented to the Governing Body	All pre-2012 apart from copy saved with master set	
1.1.6	Action plans created and administered by the Governing Body	All pre-2012	
1.1.7	Policy documents created and administered by the Governing Body	All pre-2014	
1.2.2	Minutes of SLT meetings and the meetings of other internal administrative bodies (LMT / Phase)	Review any pre 2014	
1.2.3	Reports created by the Headteacher or SLT	Review any pre 2014	
1.2.4	Records created by headteachers, deputy headteachers, heads of year and other member of staff with administrative responsibilities	Review any pre 2014	
1.2.5	Correspondence created by Headteachers, deputy Headteachers, heads of year and other members of staff with administrative responsibilities	Review any pre 2014	
1.2.6	Professional Development Plans	Dispose 2011 or previous	
1.2.7	School Development Plans	Dispose 2014 or previous	
1.3.2	Admission – if the admission is successful	Dispose all Data Collection Sept 2017 and previous years	
1.3.6	Proofs of address supplied by parents as part of the admissions process	Dispose all Data Collection Sept 2017 and previous years	
1.4.1	General file series	Review pre-2013	
1.4.3	Records relating to the creation and distribution of circulars to staff, parents or pupils	Delete all copies pre-2017-18	
1.4.3	Records relating to the creation and distribution of circulars to staff, parents or pupils	Delete all copies pre-2017-18	
1.4.4	Newsletters and other items with a short operational use	Delete all copies pre-2017-18	
1.4.5	Visitors' Books and Signing in Sheets	Destroy pre-2012	
1.4.6	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Destroy pre-2012	
2.1.1	All records leading up to the appointment of a new headteacher	Destroy all pre-2015	

2.1.2	All records leading up to the appointment of a new member of staff – unsuccessful candidates	Destroy pre-February 2019	
2.2.1	Staff Personal File	Destroy pre-September 2010	
2.2.3	Annual appraisal/assessment records	Destroy pre-September 2009	
2.3.2	Disciplinary Proceedings		
	Oral warning	Destroy pre-September 2018	
	Written warning – level 1	Destroy pre-September 2018	
	Written warning – level 2	Destroy pre-April 2018	
	Final warning	Destroy pre-September 2017	
	Case not found	If the incident is child protection related, then see above otherwise dispose of at the conclusion of the case	
2.4.1	Health & Safety Policy Statement	Destroy all pre-2014	
2.4.2	Health & Safety Risk Assessments	Destroy all pre-2014	
2.4.3	Records relating to accident/injury at work	Destroy all pre-2002 unless a major accident	
2.4.4	Accident Reporting	Destroy all pre-2002 unless a major accident (adults)	
		Destroy all for pupils 25 years and over	
2.4.5	Control of Substances Hazardous to Health (COSHH)	Destroy all pre 1977	
2.4.6	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	Destroy all pre 1977	
2.4.8	Fire Precautions log books	Destroy pre-2012	
3.2.1	Inventories of furniture and equipment	Destroy pre-2012	
3.2.2	Burglary, theft and vandalism report forms	Destroy pre-2012	
3.3.1	Annual Accounts	See New Financial Regs	
3.4.1	All records relating to the management of contracts under seal	Last payment on the contract + 12 years	
3.4.2	All records relating to the management of contracts under signature	Last payment on the contract + 6 years	
3.4.3	Records relating to the monitoring of contracts	Current year + 2 years	
3.5.1	School Fund – Cheque Books	Current year + 6 years	
3.5.2	School Fund – Paying in books	Current year + 6 years	
3.5.3	School Fund – Ledger	Current year + 6 years	
3.5.4	School Fund – Invoices	Current year + 6 years	
3.5.5	School Fund – Receipts	Current year + 6 years	

3.5.6	School Fund – Bank Statements	Current year + 6 years	
3.5.7	School Fund – Journey Books	Current year + 6 years	
3.6.1	Free school Meals Register	Current year + 6 years	
3.6.2	School Meals Register	Current year + 3 years	
3.6.3	School Meals Summary Sheets	Current year + 3 years	
5.2.1	Attendance Registers	Destroy pre-Sept 2014	
5.3.1	Special Educational Needs files, reviews and Individual Education Plans	Destroy all documents except statements / EHCPs and pertinent medical reports for all pupils	
7.1.1	Records created by schools to obtain approval to run an Educational Visit outside the Classroom – Primary Schools	Outdoor Education Advisers’ Panel National Guidance website http://oeapng.info specifically, Section 3 – “Legal Framework and Employer Systems” and Section 4 – “Good Practice”. Information kept on Evolve system	
7.1.3	Parental consent forms for school trips where there has been no major incident	Conclusion of the trip	
7.1.4	Parental permission slips for school trips – where there has been a major incident	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 pupils.	
7.3.2	Reports for outside agencies – where the report has been included on the case file created by the outside agency	Kept on pupil file	
8.1.3	School Census Returns	Destroy pre-2013	
8.2.1	OFSTED reports and papers	Life of the report then REVIEW. No longer than 6 years is required.	
8.2.2	Returns made to central government	Destroy pre 2012	
8.2.3	Circulars and other information from central government	Discretionary disposal	