

## St Nicholas C of E Primary School, Blackpool - Retention Schedule

Pupils						
1	Data item description	Personal data?	Retention period	Statutory provisions	Additional notes	Action after retention
1.1	Pupil educational record	Yes	Date of birth of pupil + 24 years	Limitation Act 1980, Section 2 The Education (Pupil Information) (England) Regulations 2005	The retention period allows 6 years from the date the child turns 18, in line with the Limitation Act. Information from record transferred to next school, as per Regs.	Secure disposal
1.2	Assessment data - formative	Yes	Whilst pupil remains at school			Secure disposal
1.3	Assessment data - summative	Yes	Whilst pupil remains at school + 1 year Aggregated, non-identifiable data kept for 5 years			Secure disposal
1.4	Statutory assessments - results	Yes	Add to pupil educational record (retention - see pupil educational record entry above)	Limitation Act 1980, Section 2 The Education (Pupil Information) (England) Regulations 2005		Secure disposal
1.5	Statutory assessments - papers	Yes (on cover)	Date of test + 1 year			Cover removed for secure disposal, remainder standard disposal
1.6	Attendance marks	Yes	Part of pupil educational record (retention - see pupil educational record entry above)	Limitation Act 1980, Section 2 The Education (Pupil Information) (England) Regulations 2005		Secure disposal. Aggregated, non-identifiable data retained for statistical analysis of attendance patterns/trends.

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1.7	Attendance - correspondence, notes, late books, signing in/out books	Yes	To the end of the academic year except where there is a possibility of legal action, when they will be kept until such action is taken	Education Act 1996 The Education (Penalty Notices) (England) Regulations 2007		Secure disposal
1.8	Child protection information	Yes	Date of birth of pupil + 24 years then review for possible further retention	Limitation Act 1980, Section 2 Children Act 2004 Education act 2002 S175 Keeping Children Safe in Education 2021		Secure disposal
1.9	Special Educational Needs records	Yes	Date of birth of pupil + 31 years	Limitation Act 1980, Section 2 Children and Families Act 2014 Equality Act 2010	Education, Health & Care Plan is valid until age of 25; the retention period adds a further 6 years in line with the Limitation Act	Secure disposal
1.10	Pupil census returns	Yes	Current year + 6 years			Secure disposal
1.11	Admissions applications, including supplementary information relating to church attendance, medical needs, etc.	Yes	Date of intended admission + 1 year	School Admissions Code 2021 School Admissions Appeals Code 2012		Secure disposal. Aggregated, non-identifiable data retained for statistical analysis of demographics.
1.12	Admissions appeals	Yes	Date of appeal + 7 years	School Admissions Appeals Code 2012	Detailed history of other appeals needed to deal efficiently with new appeals	Secure disposal

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1.13	Educational visits - consent forms	Yes	If no major incident, destroyed after visit takes place. If major incident, retain for date of birth of youngest pupil + 24 years	Limitation Act 1980, Section 2	Records for all pupils on visit should be kept, not just those directly affected by incident	Secure disposal
1.14	Medicine consent and administering records	Yes	Date of birth of pupil + 21 years	Limitation Act 1980, Section 11		Secure disposal
1.15	Exercise books	Yes (on cover)	Samples kept for evidence for 1 year following end of academic year, remainder sent home with pupils			Cover removed for secure disposal, remainder standard disposal

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Staff						
2	Data item description	Personal data?	Retention period	Statutory provisions	Additional notes	Action after retention
2.1	Personal file	Yes	Termination of employment + 6 years	Limitation Act 1980, Section 2		Secure disposal
2.2	Recruitment records - successful candidates	Yes	Add to personal file (retention - see personal file entry above)	Limitation Act 1980, Section 2		Secure disposal
2.3	Documents used to verify identity	Yes	Add to personal file (retention - see personal file entry above)	Keeping Children Safe in Education 2022 para 276		Secure disposal
2.4	Other pre-employment vetting information - successful candidates (including references, required qualification certificates, etc.)	Yes	Add to personal file (retention - see personal file entry above)	Keeping Children Safe in Education 2022 para 276	<a href="https://www.gov.uk/government/publications/right-to-work-checks-employers-guide">https://www.gov.uk/government/publications/right-to-work-checks-employers-guide</a>	Secure disposal
2.5	DBS certificate	Yes	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months.	Keeping Children Safe in Education 2022 para 275 & 243	Only kept in case of an adverse outcome. If decision taken not to appoint, this is clearly documented.	Secure disposal
2.6	Recruitment records - unsuccessful candidates (except pre-employment vetting information)	Yes	Date of interview + 6 months			Secure disposal
2.7	Pre-employment vetting information - unsuccessful candidates	Yes	Deleted when decision made not to appoint the person in question			Secure disposal

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2.8	Health surveillance records	Yes	Add to personal file (retention - see personal file entry above)		Full records kept by occupational health provider for period specified in the relevant regulations, e.g. 40 years under COSHH	Secure disposal
2.9	Absence records	Yes	Termination of employment + 6 years			Secure disposal
2.10	Timesheets	Yes	Termination of employment + 6 years			Secure disposal
2.11	Annual leave requests	Yes	End of leave year + 3 years			Secure disposal
2.12	Appraisal records	Yes	Termination of employment + 6 years			Secure disposal
2.13	Training records	Yes	Add to personal file (retention - see personal file entry above)			Secure disposal
2.14	Disciplinary - details of allegation, investigation & outcome	Yes	Termination of employment + 6 years			Secure disposal
2.15	Disciplinary - copy of letter to employee detailing sanction given	Yes	Date of sanction + period stated within it (this period could be extended if required to be used for evidence to show employee made aware of seriousness of previous behaviour)			Secure disposal
2.16	Grievance - details of allegation & investigation	Yes	Date grievance resolved + 6 years	Limitation Act 1980, Section 2		Secure disposal

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2.17	Allegations of abuse made against staff	Yes	If found to be malicious - destroyed upon this finding being made; if falls under terms of reference of IICSA, retained until IICSA enquiry complete; all other records retained until accused has reached normal pension age or for a period of 10 years from date of allegation if that is longer.	Keeping Children Safe in Education 2022 para 416		Secure disposal
2.18	Single Central Record	Yes	'Live' document; details of individuals removed once they no longer work at the school	The School Staffing (England) Regulations 2009, Schedule 2 The School Staffing (England) (Amendment) Regulations 2013 Keeping Children Safe in Education 2022 para 271		Secure disposal
2.19	School workforce census returns	Yes	Current year + 6 years			Secure disposal
2.20	Staff questionnaires	Yes	3 years			Secure disposal. Aggregated, non-identifiable data may be retained for statistical analysis of results over time.
2.21	Payroll reports	Yes	Current year + 6 years			Secure disposal
2.22	Absence monitoring reports	Yes	Current year + 1 year			Secure disposal

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<b>Volunteers</b>						
<b>3</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
3.1	Personal file including documents used to verify identity	Yes	Termination of volunteer placement + 6 years	Limitation Act 1980, Section 2 Keeping Children Safe in Education 2022 para 276		Secure disposal
3.2	DBS certificate	Yes	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months.	Keeping Children Safe in Education 2022 para 275 & 243	Only kept in case of an adverse outcome. If decision taken not to appoint, this is clearly documented.	Secure disposal
3.3	Single Central Record	Yes	'Live' document; details of individuals removed once they no longer work at the school	The School Staffing (England) Regulations 2009, Schedule 2 The School Staffing (England) (Amendment) Regulations 2013 Keeping Children Safe in Education 2022 para 271		Secure disposal

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<b>Governors</b>						
<b>4</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
4.1	Instrument of government	No	For the life of the school	Education Act 2002, Section 20 The School Governance (Constitution) (England) Regulations 2012		Consult local archives before secure disposal
4.2	Trusts and endowments	No	For the life of the school			Consult local archives before secure disposal
4.3	Minutes - principal set (signed)	Yes	For the life of the school			Consult local archives before secure disposal
4.4	Agendas & other papers prepared for governors' meetings	Yes (in some cases)	For the life of the school			Consult local archives before secure disposal
4.5	Register of business interests (annual)	Yes	Date of creation + 6 years			
4.6	Complaints made to or investigated by the governing board	Yes	Date of resolution of complaint + 6 years then review for further retention in case of contentious disputes	Limitation Act 1980, Section 2		Secure disposal
4.7	Admissions policies	No	Date of admissions year that the policy applies to + 7 years	School Admissions Code 2021 School Admissions Appeals Code 2012	Policies must be referred to on receipt of non-routine admissions, and in case of appeal, at any point that cohort is in the school	Standard disposal
4.8	Admissions policy consultation documents	Yes	Date of admissions year that the policy applies to + 7 years	School Admissions Code 2021	Governing body must consult on admissions arrangements at least every 7 years	Secure disposal



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4.9	Proposals relating to prescribed alterations	No	Date of decision + 3 years	The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013		Standard disposal
4.10	Records relating to the election of parent and staff governors not elected	Yes	Date of election + 6 months	The School Governance (Constitution) (England) Regulations 2012		Secure disposal
4.11	Records relating to the appointment of foundation governors	Yes	End of term of office	The School Governance (Constitution) (England) Regulations 2012		Secure disposal
4.12	Records relating to election of chair and vice chair	Yes	Until decision has been recorded in minutes			Secure disposal
4.13	Personal file including documents used to verify identity	Yes	End of term of office + 6 years	Limitation Act 1980, Section 2 Keeping Children Safe in Education 2022 para 276		Secure disposal
4.14	Records relating to the training received by governors	Yes	Add to personal file (retention - see personal file entry above)			
4.15	DBS certificate	Yes	The school does not have to keep copies of DBS certificates. If the school does so the copy must NOT be retained for more than 6 months.	Keeping Children Safe in Education 2022 para 275 & 243	Only kept in case of an adverse outcome. If decision taken not to appoint, this is clearly documented.	Secure disposal

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4.16	Single Central Record	Yes	'Live' document; details of individuals removed once they are no longer a governor at the school	The School Staffing (England) Regulations 2009, Schedule 2 The School Staffing (England) (Amendment) Regulations 2013 Keeping Children Safe in Education 2022 para 271		Secure disposal
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<b>Financial Management</b>						
<b>5</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
5.1	Employer's liability insurance certificate	No	Closure of school + 40 years		To be passed to the local authority if school closes	Secure disposal
5.2	Insurance claims	No	Current year + 6 years			Secure disposal
5.3	Asset register	Yes	Current year + 6 years			Secure disposal
5.4	Annual accounts including invoices, receipts, orders, delivery notes, cheque books, paying-in books, journals	No	Current year + 6 years	HMRC guidance		Secure disposal
5.5	Records relating to the collection and banking of monies, including student finance and childcare vouchers	Yes	Current year + 6 years			Secure disposal
5.6	Records relating to the identification and collection of debt	Yes	Current year + 6 years			Secure disposal
5.7	External/internal audit reports	No	Current year + 6 years			Secure disposal
5.8	Leases and contracts	No	Lease/contract expiry + 6 years			Secure disposal
5.9	Records place on register of gifts & hospitality	Yes	Current year + 6 years			Secure disposal
5.10	School Fund - cheque books, paying-in books, invoices, receipts, bank statements and reconciliations, ledger	No	Current year + 6 years			Secure disposal
5.11	School meal registers	Yes	Current year + 1 year			Secure disposal
5.12	Free school meal entitlement records	Yes	Current year + 6 years			Secure disposal

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<b>Health and Safety</b>						
<b>6</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
6.1	Accident/incident records including first aid treatment books	Yes	If relating to an adult - date of incident + 3 years If relating to a pupil - date of birth of pupil + 21 years	Limitation Act 1980, Section 11		Secure disposal
6.2	Health and safety inspection/audit reports	No	Current year + 6 years	Health and Safety at Work Act 1974		
6.3	Health and safety risk assessments	No	Life of risk assessment + 3 years providing that a copy of the relevant risk assessment/s is stored with any incident reports as above	Management of Health and Safety at Work Regulations 1999		Secure disposal
6.4	Process of monitoring of areas where people are likely to have come into contact with asbestos	No	Last action + 40 years	Control of Asbestos at Work Regulations 2012		Secure disposal
6.5	Fire log book	No	Current year + 3 years			Secure disposal
6.6	Health and safety file to show current state of building including alterations	No	Permanent		Pass to new owner on sale or transfer of building	

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<b>Property Management</b>						
<b>7</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
7.1	Title deeds of properties belonging to the school	No	Permanent		These should follow the property unless the property has been registered with the Land Registry	
7.2	Plans of property belonging to the school	No	Permanent		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	
7.3	Leases of property leased by or to the school	No	Lease expiry + 6 years			Secure disposal
7.4	Records relating to the letting of school premises	No	Current year + 6 years			Secure disposal
7.5	Service records for all statutory compliance requirements including gas safety, lift maintenance, legionella, asbestos register, fire alarm and fixed wire tests	No	Current year + 6 years			Secure disposal
7.6	CCTV footage	Yes	2 months			Secure disposal

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<b>Management (General)</b>						
<b>8</b>	<b>Data item description</b>	<b>Personal data?</b>	<b>Retention period</b>	<b>Statutory provisions</b>	<b>Additional notes</b>	<b>Action after retention</b>
8.1	School development plans	No	Life of plan + 3 years then review for possible further retention			Standard disposal
8.2	Self-evaluation forms	No	Current year + 3 years			Secure disposal
8.3	Correspondence created by staff with managerial/administrative responsibilities	Yes (in some cases)	Date of correspondence + 3 years then review for possible further retention			Secure disposal
8.4	Complaints made to or investigated by the headteacher or other staff member	Yes	Date of resolution of complaint + 6 years	Limitation Act 1980, Section 2 Education Act 2002, Section 29		Secure disposal
8.5	Signing in/out records (on electronic system)	Yes	1 year		Data automatically deleted from system after chosen period	Secure disposal
8.6	Google Analytics reports	Yes	26 months			Secure disposal
8.7	Telephone call recordings	Yes	Date of recording + 1 year			Secure disposal