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# Sir William Burrough School

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## Records Retention Policy

### Introduction

Sir William Burrough School recognises its duty to ensure that records are both kept in order to allow the school to fulfil its function, and disposed of appropriately when they are no longer required to do so. In accordance with the General Data Protection Regulation (2018) and the associated Data Protection Act (2018), the school will keep its records secure and safe; further details are available in the Data Protection Policy. This document, then, is the policy detailing the management and disposal of all records that the school maintains, regardless of the media by which they are stored.

### Scope of the Policy

This policy applies to all records that are created, received or maintained by staff of the school in the course of carrying out the functions of the school. Records are defined as all documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created or received, and then stored, in hard copy or electronically.

A small percentage of the school's records may be selected for permanent preservation as part of the schools' archive and for historical research.

### Responsibilities

The school has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. Whilst some areas come under specific statutory provisions, others are guided by guidance only, and the school has made informed decisions on how these areas are treated.

The person with overall responsibility for this policy is the Headteacher. Other members of staff are expected to manage their record keeping systems in accordance with this policy and associated retention schedule, and to take account of the different kinds of retention periods when they are creating new record systems.

### Disposal of Records

All records, hard copy and electronic, should be disposed of in accordance with the schedule below (Appendix A). Electronic files, either cloud- or server-based should be deleted. Other electronic media (CDs, DVDs, etc.) should be cut into pieces. Hard copy data of a personal nature should be shredded with a cross-cutting shredder; all other non-confidential paperwork should be recycled whenever appropriate.

### Policy Review

This policy has been reviewed by the Headteacher, Deputy Headteacher and governors as at the date below and will be reviewed and updated as necessary every three years or as legislation demands.

Signed (Chair of Governors).....

Date.....

## APPENDIX A – DATA RETENTION SCHEDULE

### PUPIL DATA

Basic file description	Data Prot issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Pupil files	Yes		Retain for the time which the pupil remains at the school	Transfer to secondary school (or other primary school) when the child leaves the school
Child Protection files	Yes	Keeping Children Safe in Education (2020)	Retain for the time which the pupil remains at the school	Transfer (under separate cover from the child's main file) to secondary school (or other primary school); receipt required
Admissions – if admission is successful	Yes		Admission + 1 year	SECURE DISPOSAL
Admissions – if appeal unsuccessful	Yes		Resolution of case + 1 year	SECURE DISPOSAL
Admission registers	Yes		7 years from departure of pupil	Retain in school for 7 years then consider transfer to archives
Attendance registers	Yes		Date of register + 3 years	SECURE DISPOSAL
Examination results (external)	Yes		Year of examinations + 6 years	SECURE DISPOSAL
SEN files	Yes		DOB of the pupil + 25 years	SECURE DISPOSAL
ECHP files	Yes		DOB of the pupil + 30 years	SECURE DISPOSAL unless legal action is pending

### STAFF DATA

Basic file description	Data Prot issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Staff Personal files	Yes		Termination of contract + 7 years	SECURE DISPOSAL
Timesheets, sick pay	Yes	Financial regulations	Current year + 6 years	SECURE DISPOSAL
Professional Development plans	Yes		Closure + 6 years	SECURE DISPOSAL
Annual appraisal and PDIs	Yes		Current year + 5 years	SECURE DISPOSAL
Records relating to injury/accident at work	Yes		Date of incident + 12 years	SECURE DISPOSAL
Maternity/Paternity pay records	Yes	Statutory guidance on Maternity/Paternity regulations	Current year + 3 years	SECURE DISPOSAL
Proof of identity	Yes		Not held	Note should be kept of what was seen and placed on file
DBS certificate	Yes	Keeping Children Safe in Education (2020)	Not held	Certificate number and date placed on the single central record
Allegation of a child protection nature against a member of staff, including where unfounded	Yes	Keeping Children Safe in Education (2020)	Until the person's normal retirement age or 10 years from the date of the allegation, whichever is the longer	SECURE DISPOSAL

### GOVERNANCE AND MANAGEMENT DATA

Basic file description	Data Prot issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
School Log Book	No		Permanent	
Minutes (signed)	No		Permanent	
Minutes (other)	No		Date of meeting + 3 years	Standard disposal (any items with personal information should be shredded)

Reports	No		Date of meeting + 6 years	Retain in school for 6 years from date of meeting
Instruments of Government	No		Permanent	Retain whilst school is open
Policy Documents	No		Expiry of policy	Standard disposal
Complaints files	Yes		Date of resolution of complaint + 6 years	Retain in school for 6 years. Review for further retention if contentious then SECURE DISPOSAL
Reports required by DfE	No		Date of report + 10 years	
Ofsted Reports	No		Replace former report with any new inspection report	Review to see whether a further retention period is required

#### FINANCIAL AND PREMISES DATA

Basic file description	Data Prot issues	Statutory Provisions	Retention Period	Action at the end of the administrative life of the record
Annual accounts	No	Financial Regulations	Current year + 6 years	Standard disposal
Budget reports and monitoring	No		Current year + 6 years	SECURE DISPOSAL
Invoices/receipts and other records covered by the Financial Regulations	No	Financial Regulations	Current year + 6 years	SECURE DISPOSAL
Order documentation (order forms, receipts etc.)	No		Current year + 6 years	SECURE DISPOSAL
Free School Meals registers	Yes		Current year + 6 years	SECURE DISPOSAL
Petty cash books	No		Current year + 6 years	SECURE DISPOSAL
Service Level Agreements	No		Until superseded	SECURE DISPOSAL