



ASIS Retaining Records Policy

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All Saints Infants School (ASIS) has a contract with Anthem Trust for the provision of Data Protection Officer services. The School therefore follows the Trust's policies and procedures in respect of data protection and the retention of records.

This policy therefore applies to all records created, received, or maintained by all ASIS permanent and temporary staff while carrying out their functions. It also includes ASIS governors, other volunteers, contractors, agents, and representatives working for or on behalf of ASIS. The ASIS Governing Body has delegated overall responsibility for the implementation of this policy and the management of school records to the Headteacher. The Headteacher delegates day-to-day responsibility to the School's Data Protection Lead, the ASIS Office Manager, who is supported by the Trust's Data Protection Officer and Deputy Data Protection Officer as part of the contract between the School and Anthem Trust.

This policy is available on the School's website.

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Issued	April 2025	Target group	All employees, consultants and volunteers
Approved by	Executive Team	Next review	April 2027

Introduction

Anthem Schools Trust and all our schools recognise that efficiently managing our records supports our compliance with our legal and regulatory obligations and contributes to the effective overall management of Anthem and our schools. Records may also provide evidence for protecting our legal rights and interests and provide evidence for demonstrating performance and accountability.

This document provides the policy framework through which this effective management of records can be achieved and audited.

Related policies

This policy should be read alongside the following:

- Data Protection Policy
- Freedom of Information Policy
- Privacy Notices

Scope and publication

This policy applies to all records created, received or maintained by all Anthem permanent and temporary staff in the course of carrying out their functions. It also includes Trustees, Members, Anthem Community Council (ACC) members, other volunteers, contractors, agents and representatives working for or on behalf of Anthem and its schools.

Records are defined as all those documents which facilitate the business carried out by Anthem and its schools and which are thereafter retained (for a set period) to provide evidence of transactions or activities. These records may be created, received or maintained in hard copy or electronic format.

This policy can be accessed on the Staffroom and GovernorHub. It is available to all others in the school community on request. It can also be made available in large print or other accessible formats if required.

Responsibilities

Anthem Schools Trust has delegated overall responsibility for this policy and the management of school records to each Headteacher, who has delegated day-to-day responsibility to the relevant school Data Protection Lead (see Appendix 2 of the Data Protection Policy), supported by the Trust Data Protection Officer (DPO) and Deputy Data Protection Officer (DDPO).

The school and National Team Data Protection Lead will:

- Give guidance in each school about good records management practice.
- Promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way.
- Monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately and when records are no longer required or

necessary, these are disposed of securely in accordance with this policy and the Retention Schedule (Appendix 1).

Individual staff members and volunteers must ensure, with respect to records for which they are responsible, that they:

- Manage the school's and Trust's records consistently in accordance with the Data Protection Policy.
- Properly document their actions and decisions.
- Hold personal information securely.
- Only share personal information appropriately and do not disclose it to any unauthorised third party.
- Dispose of records securely when they are no longer required or necessary in accordance with this policy and the Retention Schedule.
- Contact their relevant school or national team Data Protection Lead (see Appendix 2 of the Data Protection Policy) for any questions or advice.

Record retention

Anthem and its schools have a wide range of records, for example student files, personnel files, parent/carer contact details and correspondence, ACC and staff meeting minutes, registers, child protection records etc. The UK General Data Protection Regulation (GDPR), in force since 25 May 2018, requires us to retain personal data for **no longer than necessary for the purposes we process it for**.

If we wish to keep older data for analytical purposes, it can be anonymised by removing names and other personal identifiers. Another option is to replace the personal information with non-personal identifiers.

There are a number of considerations when deciding how long to keep records for, including (but not limited to):

- statutory provisions (only relate to certain records)
- the risk of future litigation – the school may need records in years to come to defend a claim (for example a personal injury claim or historic child abuse claim)
- whether the records contain personal data about an individual
- whether the records are sensitive or confidential
- historical significance.

A small percentage of our records may be selected for permanent preservation as part of Anthem and its schools' archives and for historical research. This will be done in liaison with the local county archives centre.

Record storage and monitoring

An important part of records management in Anthem and its schools is ensuring that both paper and digital records are held securely. Records must be safe from unauthorised access, theft, deletion or

damage, but they must also be available to staff who are authorised to see and use them as part of their role in school.

Many records that schools must retain will also contain personal data. Our Data Protection Policy also sets out how we should keep personal data securely stored.

Physical records storage

Physical records should be stored in a way that protects them from loss, damage (water, fire or environmental) or theft. The storage of physical records should not create health and safety risks.

Digital records storage

It is important for Anthem and its schools to manage digital records, whether they are hosted on a school network drive, cloud storage service or with an external Edtech services provider. Good digital records management and retention form the backbone of compliance with Data Protection law, by helping to ensure that:

- data subjects' rights can be fulfilled easily (i.e. makes it easy to search for information requested in a SAR)
- the data processed is minimised to what is needed
- storage of data is limited to only the length of time that it is needed for
- understanding that the school/National Team is responsible for the security of the data, whether it is stored on internal or external system.

Access controls and permissions

Whether paper or electronic, held within school, the National Team or externally, Anthem and its schools should restrict access to records to staff who are authorised to access them.

For electronic records, Anthem and its schools should monitor the level of access granted to members of staff to information and that access will be updated or removed when members of staff change roles or leave.

Where members of staff are given access to personal or sensitive personal data, additional training should be provided to ensure that they are aware of the increased risks connected to processing this data and the correct use of any devices or systems used to access these. This will include their responsibilities and the consequences of unauthorised access. Specifically, staff should be reminded regularly that access to data should be for work-related purposes only.

Site security

The following points should be taken into account:

- Doors should be left locked, and visitors should always be signed in and out of the building and accompanied if there is a risk of unauthorised access to records (even if students are not on site).
- If certain areas of the school are let out to external users, then records and personal data in those areas should ideally be located elsewhere, or securely locked.
- A clear desk policy should be introduced as this is one way to avoid unauthorised access to physical records which contain sensitive or personal information.

- Documents containing sensitive information or personal data must be collected immediately from printers and not left on photocopiers. Where possible, schools should ideally require staff to log on to a printer or copier to obtain their prints.
- Staff who take physical records from site should refer to the Data Protection Policy.
- IT equipment and infrastructure should also be stored securely. Server rooms and server cabinets should be locked with the keys removed. The temperature of server rooms should be managed to avoid overheating, and key infrastructure should be located in an area where it is not likely to be affected by flooding. Laptop/tablet trollies should be locked when not in use, and laptops/tablets counted out and back in again.
- IT equipment issued to staff should be regularly audited to ensure that it is in the safe custody to the staff that it has been issued to.
- All devices that school staff use to access the school network, the internet, Edtech tools and their emails should be password protected.
- All staff must receive training in the basics of Cyber Security and provide links to free training provided by the National Cyber Security Centre.

Monitoring staff and student use

Through the Anthem 'Acceptable Use Agreement' staff members, students and volunteers agree that all their activity, using any digital technologies owned or operated by the Trust, may be logged and recorded to investigate suspected breaches of policy. Monitoring may include live screen capture, internet traffic logs, CCTV, communications (telephone, email, instant messaging).

Disposing of records

Disposal of physical records

Anthem and its schools need to ensure that records are disposed of when they reach the end of their statutory retention period (see the retention schedule in Appendix 1).

Under the UK GDPR and Data Protection Act 2018, Anthem and its schools should ensure that records which contain personal information are disposed of in a way that ensures that the information is protected against unauthorised access.

Physical records which contain personal and/or sensitive personal information should either be:

- shredded using a cross-cutting shredder, or
- shredded on site by an external company.

If the school has a secure waste contract, the records should be placed in the confidential waste bins provided by the secure waste contractor, ensuring these are protected against unauthorised access until these are shredded.

Schools should carry out due diligence on these waste contractors and consider if a DPIA is required. Different waste providers will quote different accreditations, however, the main accreditation to look for is BS EN 15713:2009 as this covers the requirements for the management of confidential waste. If the school uses an external company to destroy records, it must:

- shred all records on-site in the presence of an employee

- be able to prove that the records have been destroyed and provide a certificate of destruction
- have trained its staff in the handling of confidential documents
- destroy storage media and hard disks to particles no larger than 6mm
- dismantle and shred audio and video tapes.

Schools may also have records which do not contain personal and/or sensitive personal information, but which are still commercially sensitive or may contain information which would cause reputational damage if it was disclosed during the disposal process. These records should also be disposed of as mentioned above.

Other physical records can be disposed of using the standard recycling/waste disposal methods.

The Freedom of Information Act 2000 requires schools to maintain a list of records that have been destroyed and who authorised their destruction. You must have approval from a senior leader for the record to be destroyed. You must document the destruction. Record a brief description of the data, the number of files and who authorised the destruction. Shred the records as soon as you've documented them as having been destroyed.

Disposal of digital records

Emails

Emails and their attachments are subject to SARs and FOI requests. The more there are and the more places they are stored, the more complicated the process become.

It is advisable that any emails that need to be kept (e.g. safeguarding correspondence, complaint, item to be placed on a student file, correspondence about a disciplinary case) should be identified and filed into the right place in your SharePoint Team filing structure. It is important to ensure that staff understand that email systems are designed to be a 'postbox' rather than a 'filing cabinet'.

Other electronic records

Electronic records should be deleted when they have reached the end of their statutory retention or when they are no longer required. Staff should delete any other electronic copies e.g. the electronic 'recycle bin' as well as any backups or other storage media.

Appendix 1: Retention schedule

The Information and Records Management Society (IRMS) has published a toolkit designed to assist schools to fulfil their obligations under the Freedom of Information Act 2000, the Data Protection Act 2018 and the UK GDPR. This toolkit provides information about all aspects of the information management lifecycle from creation to disposal.

The Department for Education (DfE) has also issued a [Data Protection in schools toolkit](#). The Trust has referred to both these documents in producing our retention schedule, set out in this Appendix 1.

The following retention schedule lays down the length of time which the record needs to be retained and the action which should be taken when it is of no further administrative use. This retention schedule is not exhaustive. Staff members and volunteers should contact their school Data Protection Lead or National Team Data Protection Lead for any queries relating to retention of records.

General/admin records

Record	Retention period	At end of retention period
Management of Complaints	Date of resolution of complaint + 3 years then review. If the complaint relates to negligence or safeguarding, then date the complaint resolved + 15 years. If the complaint relates to child sexual abuse, then the complaint resolved + 75 years.	Dispose of records securely
Whistleblowing reports	Conclusion of the whistleblowing case + 3 years	Dispose of records securely
Logbooks	Date of last entry + 6 years then review	Dispose of records securely
Visitor management system	Current year + 1 year	Dispose of records securely
Reports and correspondence created by the Headteacher or management team and other members of the staff with admin responsibilities (unless relates to a complaint or allegation, see above).	Date of record + 3 years then Review	Dispose of records securely
Minutes of Senior Management Team meetings	Date of the meeting + 3 year then review	Dispose of records securely
School Development Plans	Life of plan or until plan superseded + 3 years. If major changes are made to the plan, then an archive copy of previous plans should be retained.	Dispose of records securely

Strategic Review	Life of the review or until review superseded + 3 years	Dispose of records securely
Ofsted reports and papers	Life of the report then review	Dispose of records securely
Records relating to the creation and publication of the school brochure or prospectus	Current year + 3 years	Dispose of records securely
Newsletters and staff, parents/carers or student circulars	Current year + 1 year	Dispose of records securely
Records relating to the creation and management of PTAs and/or old student associations	Current year + 6 years then review	Dispose of records securely
Returns made to central government	Current year + 6 years	Dispose of records securely
School census returns	Current year + 5 years	Dispose of records securely
Curricular record <i>Further information:</i> The Education (School Records) Regulations 1989. Regulation 3 of the Education (Pupil Information) (England) Regulations 2005	At least 1 year.	Dispose of records securely
Schemes of Work Timetables Class record books Mark books Record of homework set	Current year + 1 year and review	Dispose of records securely
Students' work	Where possible, work should be returned to the student at the end of the academic year. If this is not the school's policy, then current year + 1 year.	Dispose of records securely

Financial and contract records

Record	Retention period	At end of retention period
Financial records (invoices, receipts, order books and requisitions, delivery notices) Records relating to the collection and banking of monies School Fund Bank statements School Fund Paying in books	Current financial year + 6 years	Dispose of records securely
All records relating to the creation and management of budgets, including the Annual Budget	Life of the budget + 3 years	Dispose of records securely

statement and background papers		
Statement of financial activities for the year Financial planning Value for money statement	Current financial year + 6 years	Dispose of records securely
Independent auditors' report on regularity and financial statements	Current financial year + 6 years	Dispose of records securely
School meals registers (including FSM)	Current financial year + 3 years	Dispose of records securely
School meals summary sheets	Current year + 6 years	Dispose of records securely
Records relating to loans	Date of last payment + 6 years (if under £10,000) or date of last payment + 12 years (if over £10,000)	Dispose of records securely
Record relating to contracts <i>Further information:</i> Section 2 of the Limitation Act 1980	6 years from the last payment on the contract. Please also refer to the Procurement Policy.	Dispose of records securely
Records relating to the management of software licences	Date licence expires + 6 years	Dispose of records securely
Debtor's records <i>Further information:</i> Section 2 of the Limitation Act 1980	6 years from end of the financial year	Dispose of records securely
Insurance policies	Date the policy expires + 6 years except Public Liability insurance and Employers Liability Insurance Certificate - day of issue + 40 years	Dispose of records securely
Records relating to the settlement of insurance claims	Date claim settled + 6 years	Dispose of records securely
Annual accounts	Current year + 6 years	Dispose of records securely
Funding Agreement with Secretary of State and supplemental funding agreements Funding Agreement Termination of the funding agreement Funding Records Capital Grant Funding Records Earmarked Annual Grant (EAG) Funding Records General Annual Grant (GAG) Per student funding records Funding records	Date of last payment of funding + 6 years	Dispose of records securely

Gift Aid and Tax Relief Exclusions agreement		
Pupil Premium Fund records	Date student leaves the provision + 6 years	Dispose of records securely
Pupil Grant applications	Current year + 3 years	Dispose of records securely
Investment policies	Life of the investment + 6 years	Dispose of records securely
Records relating to the management of VAT <i>Further information:</i> Record keeping (VAT Notice 700/21)	Current financial year + 6 years	Dispose of records securely
Inventories of furniture and equipment	Life of equipment + 6 years	Dispose of records securely
Burglary, theft and vandalism report forms	Current year + 6 years	Dispose of records securely
Disposal of assets	Date asset disposed of + 6 years	Dispose of records securely
School Fund Ledger	Current financial year + 6 years	Dispose of records securely

Student records

Record	Retention period	At end of retention period
Child protection files* Child protection files should be stored either as a separate file or in a sealed envelope in the student file. <i>Further information:</i> Keeping Children Safe in Education, sections 122 and 123. The Report of the Independent Inquiry into Child Sexual Abuse (IICSA) recommendation on access to records.	Primary schools only need to keep the records until the student transfers to a secondary school or other primary school, when you should send the information to the new school. Secondary schools should keep child protection files for 25 years from the child's date of birth. If the file relates to child sexual abuse, retain until the child's 75th birthday. If the child dies before the age of 18, you can keep the records for 6 years from the date of death.	Child protection files should be passed on to any new school a child attends. This should be transferred as separately from the main student file. Dispose of records securely
Court Orders	Schools must not keep more personal information on file than is absolutely necessary. Therefore, you should only keep a copy of a court order relating to a student if having this extra information would be useful or to make sure you have enough information to keep the student safe	Transfer to any new school if applicable Dispose of records securely

Student records – primary <i>Further information:</i> See The Education (Pupil Information) (England) Regulations 2005 for details of what to keep in the pupil record. There is guidance on how to transfer information to another school.	Until the student leaves the school.	Transfer to secondary school, other primary school or a student referral unit when the student leaves. If the student dies whilst at primary school, the file should be returned to the LA. If the student transfers to an independent school, to home schooling or leaves the country, the school should discuss with the local authority about where the file should be stored for the remainder of its statutory retention*. Records for Children Missing from Education are retained at the last setting they were on roll.
Student records - secondary <i>Further information:</i> See The Education (Pupil Information) (England) Regulations 2005 for details of what to keep in the education record. Retain as detailed in section 2 of the Limitation Act 1980. There is guidance on what to do if the academy closes before the end of the retention period.	Until the student's 25th birthday. The school which the student attended until statutory school leaving age (or the school where the student completed sixth form studies) is responsible for retaining the student record until the student reaches the age of 25.	Dispose of records securely. If the student leaves to go to another school, transfer the records to that school.
All records relating to the creation and implementation of the School Admissions Policy	Life of policy + 7 years	Dispose of records securely
Admissions if the appeal is unsuccessful	Resolution of case + 1 year	Dispose of records securely
Admissions <i>Further information:</i> Regulation 7 of the School Attendance (Pupil Registration) (England) Regulations 2024.	6 years from the admission date	Dispose of records securely
Attendance Registers <i>Further information:</i> Regulation 7 of the School Attendance (Pupil Registration) (England) Regulations 2024.	Date of last entry + 6 years. To be kept electronically. Backups may be on paper. After this period only non-identifying summary statistics can be retained for trend analysis.	Dispose of records securely
Correspondence relating to any absence (authorised or unauthorised)	Current academic year + 2 years	Dispose of records securely

Special educational needs and disabilities (SEND), including reviews and education, health, and care (EHC) plans. <i>Further information:</i> SEND code of practice: 0 to 25 years. Retain as detailed in section 2 of the Limitation Act 1980. Regulation 17 of The Special Educational Needs and Disability Regulations 2014	6 years from the cessation of the EHC plan.	Dispose of records securely, unless the document is subject to a legal hold. If the student leaves to go to another school, transfer the records to that school.
Accessibility Plan relating to individual students Advice and information provided to parents regarding educational needs <i>Further information:</i> Special Educational Needs and Disability Act 2001 Sections 2 and 14	This would normally be retained on the student file unless the document is subject to a legal hold then date legal action ceases + 6 years.	Dispose of records securely, unless the document is subject to a legal hold. If the student leaves to go to another school, transfer the records to that school.
SATs records Examination papers	The examination papers should be kept until any appeals/ validation process is complete.	Dispose of records securely
SATs records results	The SATS results should be recorded on the student's educational file and will therefore be retained until the student reaches the age of 25 years. The school 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.	Dispose of records securely
Examination results Student copies: Public	This information should be added to the student file	Schools should follow the instructions of the Examination Board about disposing of uncollected certificates.
Management of examination registrations	The examination board will usually mandate how long these records need to be retained	Dispose of records securely
Records created by schools to obtain approval to run an educational visit outside the classroom. <i>Further information:</i> Limitation Act 1980	Date of visit + 15 years	Dispose of records securely
Records of educational visits	10 years from the date of the visit.	Dispose of records securely

<i>Further information:</i> Health and safety on educational visits. Retain as detailed in section 2 of the Limitation Act 1980	If there was an incident on the visit, retain the permission slips for all students and the incident report in the student record.	
Records relating to residential trips <i>Further information:</i> Limitation Act 1980	Date of birth of youngest student involved + 25 years or if there is a major incident then date of incident + 15 years, whichever is the longer.	Dispose of records securely
Records relating to administration of medicines	Keep for as long as those students are at the school.	Dispose of records securely
Consents relating to school activities as part of GDPR compliance	Consents should be retained for as long as the consent is relied on.	Dispose of records securely
Walking bus registers	Date of register + 3 years. This takes into account the fact that, if there is an incident requiring an accident report, the register will be submitted with the accident report and kept for the period of time required for accident reporting	Dispose of records securely

*Transferring student records

The legislation states that the record should be transferred to the next setting within fifteen school days of confirmation that a student is registered at another school. Academies and free schools are 'strongly encouraged' to send a common transfer file (CTF) when a student leaves to attend another school. The CTF doesn't include child protection files.

When transferring paper records, the [Information Commissioner's Office](#) said you should create an audit trail that details:

- How the records have been transferred.
- What measures were taken to protect students' personal data during transfer.

It may be safest and easiest for a member of school staff to deliver the records by hand. If this is the case, record:

- How the records were sealed prior to transfer.
- Who delivered the files, on what date and at what time.
- Who received the files (including a signature).

If you need to send students' records by courier or post, you must:

- Ensure they're appropriately sealed to reduce the risk of envelopes opening and causing a data breach.
- Ask for a receipt of delivery.

Staff records

Record	Retention period	At end of retention period
Personnel files <i>Further information:</i> Section 2 of the Limitation Act 1980	Termination of employment + 6 years	Dispose of records securely
Pre-employment vetting information DBS Checks <i>Further information:</i> Keeping children safe in education .	Schools do not have to keep copies of DBS certificates to fulfil the duty of maintaining the single central record. When a school chooses to retain a copy, there should be a valid reason for doing so and it should not be kept for longer than six months. The single central record (SCR) must include details of any barred list check, enhanced DBS checks and other safeguarding checks, including the date each check was completed or the certificate obtained.	Dispose of records securely
Performance Management records	Current year + 6 years	Dispose of records securely
Records relating to the agreement of pay and conditions	Date pay and conditions superseded + 6 years	Dispose of records securely
Pay records <i>Further information:</i> PAYE and payroll for employers: Keeping records	3 years from the end of the tax year they relate to.	Dispose of records securely
Maternity pay records <i>Further information:</i> The Statutory Maternity Pay (General) Regulations 1986	3 years after the end of the tax year in which the maternity pay period ends.	Dispose of records securely
Retirement benefits <i>Further information:</i> Regulation 15 of the Retirement Benefits Schemes (Information Powers) Regulations 1995	A minimum of 6 years from the end of the year in which the accounts were signed.	Dispose of records securely
Capability procedures	Please refer to the Capability Policy.	Dispose of records securely
Allegation of a child protection nature against a member of staff, including where the allegation is unfounded. <i>Further information:</i>	Until the person's normal retirement age or 10 years from the date of allegation whichever is the longer. Where an allegation is found to be malicious, it will be removed	Dispose of records securely

<u>Keeping children safe in education.</u> <u>Working together to safeguard children.</u>	from the record of the employee concerned.	
All records leading up to appointment of a new Headteacher.	Length of appointment + 6 years	Dispose of records securely
All records leading up to appointment of a new member of staff – successful candidates.	All relevant info added to staff personal file.	Dispose of records securely
All records leading up to the appointment of a new member of staff – unsuccessful candidates.	Date of appointment of successful candidate or, if none, end of recruitment process + 6 months	Dispose of records securely
Disciplinary procedure records	Please refer to the Disciplinary Policy	Dispose of records securely
Grievance records	Date of resolution of complaint + 3 years then review. If the complaint relates to negligence or safeguarding, then date the complaint resolved + 15 years. If the complaint relates to child sexual abuse, then the complaint resolved + 75 years.	Dispose of records securely
Timesheets	Current year + 3 years	Dispose of records securely
Payslips copies	Current year + 6 years	Dispose of records securely
Sickness & absence records	Current year + 3 years	Dispose of records securely
Records relating to pension registrations	Date of last payment on the pension + 6 years	Dispose of records securely
Management of the Teachers' Pension Scheme	Date of last payment on the pension + 6 years	Dispose of records securely
Tax forms P6 / P11 / P11D / P35 / P45/ P46 / P48	Current year + 6 years	Dispose of records securely
Records relating to the TUPE process	Date last member of staff transfers or leaves the organisation + 6 years	Dispose of records securely
Single Central Record	The details of an individual should be removed from the single central record once they no longer work at the school.	

Health & Safety records

Record	Retention period	At end of retention period
Health and Safety risk assessments	Life of document + 3 years	Dispose of records securely
Accessibility plans <i>Further information:</i> Retain as detailed in section 2 of the Limitation Act 1980	Life of plan plus 6 years.	Dispose of records securely
Accident book records Accidents involving students should be retained in the student record . <i>Further information:</i> Regulation 25 of the Social Security (Claims and Payments) Regulations 1979	3 years from the date of the accident – but if there is possibility of negligence allegation then date of incident + 15 years or date of settlement + 6 years.	Dispose of records securely
First aid records	This is not the same as the statutory accident book, although schools are free to combine the two records if that is easier. There is no statutory retention period for first aid records. You can decide when to dispose of these records.	Dispose of records securely
Monitoring exposure to substances hazardous to health, including asbestos <i>Further information:</i> The Control of Substances Hazardous to Health Regulations 2002	5 years	Dispose of records securely
Health surveillance records <i>Further information:</i> The Control of Substances Hazardous to Health Regulations 2002 . Health surveillance - Record keeping .	40 years	Dispose of records securely
Other health records of staff <i>Further information:</i> The Control of Substances Hazardous to Health Regulations 2002 . HSE guidance on Health surveillance - Record keeping	While the worker is employed in your school.	Dispose of records securely

Fire precautions logbooks	Current year + 6 years	Dispose of records securely
Fire risk assessments <i>Further information:</i> Fire Service Order 2005 . Retain as detailed in section 2 of the Limitation Act 1980	Life of the risk assessment + 6 years	Dispose of records securely

Property records

Record	Retention period	At end of retention period
Title Deeds <i>Further information:</i> Section 2 of the Limitation Act 1980	12 years from end of deed	Dispose of records securely
Plans of property belonging to the school	These should be retained whilst the building belongs to the school	Dispose of records securely
Leases	Expiry of lease + 6 years	Dispose of records securely
Lettings of school premises details	Current financial year + 6 years	Dispose of records securely
Business continuity and disaster recovery plans	These are dynamic documents which should be kept up to date	Dispose of records securely
Records relating to maintenance of the school carried out by contractors. <i>Further information:</i> Record keeping (VAT Notice 700/21)	Current year + 6 years	Dispose of records securely
All records relating to the maintenance of the school carried out by school employees, including maintenance log books.	Life of equipment + 6 years	Dispose of records securely
School vehicles <i>Further information:</i> Section 2 of the Limitation Act 1980	6 years from the disposal of the vehicle	Dispose of records securely
Service logs and vehicle logs <i>Further information:</i> Limitation Act 1980	Life of the vehicle, then either to be retained for 6 years by school or to be returned to lease company.	Dispose of records securely

Governance records

Record	Retention period	At end of retention period
Appointment of Trustees, Members and ACC members & Personnel files <i>Further information:</i> Companies Act 2006 section 355	Date appointment ceases plus 6 years except where there have been allegations concerning children. In this case retain for 25 years.	Dispose of records securely
Trustees, Members & ACC meetings - agendas, minutes and associated papers	10 years from the date of the meeting	Dispose of records securely
Minutes – principal set (signed)	Generally kept for the life of the organisation	
Statutory Registers of Trustees and Members & ACC members <i>Further information:</i> Companies Act 2006	Date of resignation + 10 years	Dispose of records securely
Articles of Association	Life of the academy	
Memorandum of Association	This can be disposed of once the Academy has been incorporated	Dispose of records securely
Memorandum of Understanding	Life of Memorandum of Understanding + 6 years	Dispose of records securely
Written Scheme of Delegation Companies Act 2006 section 355	Life of Written Scheme of Delegation + 10 years	Dispose of records securely.
Annual Report and Accounts Annual Report Trustees Report Annual Return <i>Further information:</i> Companies Act 2006 section 355	Date of report + 10 years	Dispose of records securely
Annual Reports created under the requirements of the Education (Governors Annual Reports) (England) (Amendment) Regulations 2002	Date of report + 10 years	Dispose of records securely
Directors – disqualification <i>Further information:</i> The Education (Company Directors Disqualification Act 1986: Amendments to Disqualification Provisions) (England) Regulations 2004	15 years from the date of disqualification.	Dispose of records securely

Complaints Policy Data Protection Policy FOI Policy Special Educational Needs Policy Charging and Remissions Policy Health & Safety Policy	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained	Dispose of records securely
Privacy Notices	Life of the privacy notice/until the privacy notice plus 6 years	Dispose of records securely
Equality Information and Objectives (public sector equality duty). Statement for publication	Life of statement or date statement superseded + 3 years	Dispose of records securely
Risk and Control Framework	Life of framework or framework superseded + 3 years. If major changes are made to the framework, then an archive copy of previous policies should be retained	Dispose of records securely

Other records

Record	Retention period	At end of retention period
Subject Access Requests	Keep the information for a minimum of one year and longer if there is a need to do so (i.e. risk of a claim).	Dispose of records securely
Recordings of phone calls	21 days from time of phone call. A request can be sent to the IT team if there is a need to retain a recording longer (i.e. an investigation is taking place, a complaint is being dealt with etc).	Dispose of records securely
CCTV footage	Please refer to the CCTV policy	Dispose of records securely