

# Priestley Primary School

## DISPOSAL OF RECORDS SCHEDULE

Reviewed Autumn 2022



This disposal schedule identifies the disposal arrangements for all manual and electronic records created by Priestley Primary School.

### 1. Categories of Disposal

- Destruction
- Permanent Preservation

### 2. Operation of this Records Disposal Schedule

#### Closing a file

Manual records should be closed as soon as they cease to be of active use other than for reference purposes. When a file is due to be closed an appropriate member of staff should consult the disposal schedule and mark the front cover of the file, indicating the date on which the file can be destroyed, or whether it should be reviewed by a member of staff. Closing a file simply means that no further papers can be added but the file can be used for reference.

#### Minimum Retention Period

With the exception of pupil files, the minimum retention period required for each type of record is calculated from the point the file/record is closed.

#### Destroy

Where the disposal action states 'Destroy' the records should be kept for the period stated and then destroyed securely. A record must be maintained of the files that have been destroyed.

#### Legislation and Guidance

This policy meets the requirements of the [Data Protection Act 1998](#), and is based on [guidance published by the Information Commissioner's Office](#) and [model privacy notices published by the Department for Education](#).

It also takes into account the expected provisions of the [General Data Protection Regulation](#), legislation which came in to force in 2018.

In addition, this policy complies with regulation 5 of the [Education \(Pupil Information\) \(England\) Regulations 2005](#), which gives parents the right of access to their child's educational record.

Priestley Primary School declares that it will take measures to ensure that the records it creates (including electronic records) will be well maintained and protected while they are in its custody.

### **3. Definitions**

The main functional areas for which Priestley Primary School keeps for are:

- 1) Management and Organisation
- 2) Pupils
- 3) Staff
- 4) Finance
- 5) Health and Safety

The records contained within these functional areas provide evidence and information about its business activities and are important for the efficient operation of the school.

#### **Management and Organisation**

This category comprises records held which relate to the management and organisation of the school. Typical records would include the minutes of the Board of Governors, the Senior Management Team and Parent/Teachers Association meetings which record the major decision making processes of the school. Also included are records detailing development, planning and curriculum policies as well as those that demonstrate how the school reports to its parents and other organisations. Records include the School Development Plan, the School Prospectus, Curriculum policies, Annual Report, Emergency Planning and Business Continuity Plan along with the records of meetings, minutes, and policies documenting the decisions and actions taken within this business function.

#### **Pupils**

Pupil Files contain vitally important records which, not only capture the progress of the student throughout their time at the school, but also contain personal details and information beneficial to their wellbeing within the school environment. Such records would include admission data, attendance of the pupils at the school, timetables and class groupings, education/progress reports of pupils, special education needs documentation, child protection information, disciplinary action taken, examination results, careers advice, school trip details and medical records (details of medical conditions where medicines are required to be administered at school).

#### **Staff**

Staff category refers to those records required for the Human Resources Management function within the school. These include staff personnel records (recruitment, interview notes, appointments, training, staff development etc), staff salary records, staff induction, sickness records, staff performance review, substitute teacher records and student teachers on teaching practice etc.

#### **Finance**

This business function maintains records for a range of financial activities such as annual budgets, budget monitoring, Annual Statement of Accounts, procurement, tender information and prices, reconciliation of invoices, audit reports etc.

#### **Health & Safety**

The health and safety of children and staff is of paramount importance in the school and such records to support this are kept e.g. Accident/Incident Book, legal/accident/incident forms, risk assessments, fire procedure, CCTV, security system files, health and safety policy statement.

### **4. Electronic Records**

The legal obligation to properly manage records, including compliance with Data Protection legislation, applies equally to electronic records. The main considerations for the management of electronic records are therefore the same as those for manual records. They include:

- Staff must be able to use and access electronic information effectively
- Adequate measures must be in place to ensure all information is stored securely and only available to authorised persons.
- A system must be in place for disposing of electronic records in line with policy once they are no longer needed.

In addition to the above, sufficient backup/recovery processes must be in place. There must also be a process through which links are created from electronic records to any associated manual records. This is to ensure a full record can be considered when necessary ie when decision making, providing access or considering a record for disposal.

## 5. School Disposal Schedule

### Management & Organisation

Ref	Record	Minimum Retention Period
1.1	Board of Governors – general correspondence	Current school year + 6 years
1.2	Board of Governors Meetings Minutes (master)	Current school year + 6 years
1.3	Senior Management Team-Meeting Minutes	Current school year + 6 years
1.4	Staff Meeting Minutes	Current school year + 6 years
1.5	School Development Plan	Retain in school for 10 years from closure of Plan
1.6	School Policies	Retain while current. Retain 1 copy of old policy for 2 years after being replaced
1.7	PTA – minutes and general correspondence	Current school year + 6 years
1.8	Visitors Book	Current school year + 6 years
1.9	Circulars to Staff, Parents and Pupils	Current school year + 3 years
1.10	School Brochure or Prospectus	Current school year + 3 years
1.11	Comments/Complaints	5 years after closing. Review for further retention in the case of contentious disputes
1.12	Annual Report	Retain in school for 10 years from date of Report
1.13	School Fund	Current financial year + 6 years
1.14	Emergency Planning/Business Continuity Plan	Until superseded

## Pupils

Ref	Record	Minimum Retention Period
2.1	<i>Pupil Admission Data</i>	3 years after enrolment
2.1a	Applications for enrolment	3 years after enrolment
2.1b	Transfer applications (Transfer Forms)	3 years after enrolment
2.2	Pupil Attendance Information/Registers	Date of Register + 10 years
2.3	Pupil Education Records - School/Progress Reports etc	Until pupil is 23 years old
2.4	Pupil Education Records - School/Progress Reports etc (Special Educational Needs)	Until Pupil is 26 years old
2.5	Child Protection Information- Record of concerns where case was not referred to Social Services	10 years after last entry on file
2.6	Child Protection Information- Social Services investigation outcome was unfounded or malicious	10 years after last entry on file
2.7	Child Protection Information- Social Services investigation outcome was inconclusive, unsubstantiated or substantiated	Until pupil is 30 years old
2.8	Disciplinary Action (Suspension/Expulsion)/Offences – bullying	Until pupil is 23 years old
2.9	Disciplinary Action (Suspension/Expulsion)/Offences – bullying (Special Educational Needs)	Until pupil is 26 years old
2.10	Timetables + Class Groupings	Retain while current
2.11	Examination Results	Current school year + 6 years
2.12	Careers Advice	Current school year + 6 years
2.13	School Meals returns	Current financial year + 6 years
2.14	Free Meals registers	Current financial year + 6 years
2.15	School Trips – Financial & Administration details	Current financial year + 6 years
2.16	School Trips-Attendance/Staff Supervision etc	Current financial year + 6 years. In the case of an incident/accident involving a pupil, retain until pupil is 23 years old or 26 for a pupil with special educational needs

2.17	Reports of Stolen/Damaged Items	Current financial year + 6 years	Dest
2.18	Medical Records – records of pupils with medical conditions and details for the administration of drugs when necessary.	Until pupil is 23years old or in the case of a Special Needs Pupil, until 26 years old	Dest

### Staff

Ref	Record	Minimum Retention Period
3.1	Staff Personnel Records (including, appointment details, training, staff development etc.)	7 years after leaving employment
3.2	Interview notes and recruitment records	Date of interview + 6 months
3.3	Staff Salary Records	7 years after leaving employment
3.4	Staff Sickness Records (copies of Medical Certs)	Current school year + 6 years
3.5	Substitute Teacher Records	Current school year + 6 years
3.6	Substitute Staff Records-non teaching (cover for nursery assistants)	Current school year + 6 years
3.7	Student Records-non teaching (e.g. nursery assistant students & pupils from schools on work experience)	Current school year + 6 years
3.8	Student Teachers on Teaching Practice – student teacher progress	Current school year + 6 years
3.9	Procedures for Induction of Staff	Until superseded
3.10	Staff/Teachers' Attendance Records	7 years after leaving
3.11	Staff Performance Review	7 years after leaving

### Finance

Ref	Record	Minimum Retention Period
4.1	Annual budget and budget deployment	Current financial year + 6 years
4.2	Budget Monitoring	Current financial year + 6 years
4.3	Annual Statement of Accounts (Outturn Statement)	Current financial year + 6 years
4.4	Invoices, Bank Records, etc	Current financial year + 6 years

4.5	Audit Reports	Current financial year + 6 years
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**Health & Safety**

Ref	Record	Minimum Retention Period
5.1	Accident Reporting (Adults)	Date of incident + 7 years
5.2	Accident Reporting (Children)	Until pupil is 23years old or in the case of a Special Needs pupil, until 26 years old
5.3	Risk Assessments – work experience locations/pupils	7 years
5.4	H & S Reports	15 years
5.5	Fire Procedure	Until superseded
5.6	Security System File	For the life of the system

The School recognises that the efficient management of its records is necessary to comply with its legal and regulatory obligations and to contribute to the effective overall management of the school.

**To be reviewed Autumn 2025**