



PAULL PRIMARY SCHOOL

DOCUMENT RETENTION POLICY 2020

Aims: The aims of this policy are to ensure the school retains records and information for the correct amount of time, and in an appropriately secure manner, prior to secure disposal – taking advice and guidance from the relevant authorities.

Paull Primary School has a responsibility to maintain its records and record keeping systems. When doing this, the School will take account of the following factors:

- The most efficient and effective way of storing records and information;
- The confidential nature of the records and information stored;
- The security of the record systems used;
- Privacy and disclosure; and
- Their accessibility.

Data Protection:

This policy sets out how long employment-related and pupil data will normally be held by us and when that information will be confidentially destroyed in compliance with the terms of the General Data Protection Regulation (GDPR) and the Freedom of Information Act 2000.

Data will be stored and processed to allow for the efficient operation of the School. The School's Data Protection Policy outlines its duties and obligations under the GDPR.

Examples specific to Paull Primary School - Governors

The school keep all signed Governor minutes from Full Governor Meetings and Sub Committee Meetings. All documentation from the meetings are stored securely in school and follow the retention period in the table below.

The Local Authority 'securely' keep a permanent record of all Full Governor paper work and minutes.

<u>Description of record/information</u>	<u>Retention period/action at end of administrative life/school response to advice</u>
Agendas for Full Governing Body meetings and Minutes of Governing Body meetings.	A copy of these is kept by the ERYC clerk at each FGB meeting for keeping by the LA. The principal sets of these are to be kept permanently – <i>see above</i>
Inspection copies of FGB agendas and minutes	Should be kept for 3 years from date of the

	meeting then shredded if contain sensitive, personal information. <i>Paper copies are kept in school for this time.</i>
Reports presented to the Governing Body	Should be kept for a minimum of 6 years – <i>scanned copies archived at ERYC. Paper copies kept in school while relevant – usually 3 years.</i>
Instruments of Government	Should be kept permanently – <i>these will be archived by ERYC.</i>
Action Plans created and administered by GB	Kept for the life of the plan then 3 more years – secure disposal – <i>scanned copies archived at ERYC. Paper copies kept in school while relevant – usually 3 years.</i>
Policy documents created and administered by GB	Kept for the life of the policy then 3 more years – secure disposal. <i>(May be kept electronically in school however paper copies would be archived by ERYC if presented to FGB).</i>
Records relating to complaints dealt with by GB	Date of resolution then a minimum of 6 years – then review for further retention in case of contentious disputes – secure disposal. <i>Paper copies would be kept in school for this time.</i>
Any proposals for change of status of a maintained school.	Would be kept from the date proposal accepted or declined then 3 more years – secure disposal.

Headteacher and Senior Leadership:

Minutes of SLT meetings and other internal administrative bodies	Kept for 3 years from date of meeting, then review – secure disposal. <i>[Formal meetings of SLT and staff meetings have never been kept – we use a ‘personal agenda/memo’ style of recording actions from meetings.]</i>
Reports created by HT or SLT	Kept for 3 years from date of report – secure disposal.
Records created by HT, SLT, or admin	Kept for current academic year plus 6 years then review before secure disposal.
Correspondence created by HT, SLT or admin	Kept for 3 years from date of correspondence then review – secure disposal.
Appraisal documents	Kept for life of plan plus 6 years then secure disposal. <i>(These are kept securely in HT’s office – though may be kept electronically)</i>
School Development Plans	Kept for life of plan plus 3 years then secure disposal. <i>(These would be archived by ERYC as always presented to FGB but Paper copies kept in school while relevant – usually 3 years.)</i>

Including the following specific examples for our school (not a comprehensive list):

<u>Description of record/information</u>	<u>Retention period/action at end of administrative life/school response to advice</u>
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All records leading up to the appointment of a new member of staff – unsuccessful candidates	Date of appointment of successful candidate + further 6 months.
All records leading up to the appointment of a new member of staff – successful candidate	All relevant information added to staff file.
Health and Safety Risk Assessments	Life of assessment and 3 further years (this may be kept electronically)
Fire precautions log books	6 Years
Annual Financial Accounts	6 Years
All records relating to creation and management of budget	Life of budget and 3 further years
All invoices, receipts, order books etc.	Current financial year + 6 further years
All school fund records	Current financial year + 6 further years
School Meals Registers	Current year + 3 years
All records relating to property maintenance	Current year + 6 years
Pupil Education Records	Retained while the child remains at the primary school - File should follow the pupil when he/she leaves the primary school.
Child Protection information held on pupil file	Retained as per pupil file – transferred securely in sealed envelope upon the child leaving
Correspondence relating to authorised absence	Kept for current year + 2 further years
Special Educational Needs files, reviews, and IEP's	Minimum retention period = same as Pupil's file as this is where paperwork would be kept.
School copies of examination results, including contextual data	Current year + 6 years (This may be kept electronically in school)
Examination Papers	These should be kept until any appeals/validation process is complete – then secure disposal
Curriculum documents – timetables, mark books, record books etc.	Current year and one further year
Pupils' Work	Where possible pupils' work should be returned to the pupil at the end of the academic year - if this is not possible then disposal/return after one further year.
Educational Visits approval forms	Date of visit + 14 further years. (Good practice – not statutory)
Educational Visits – parental consent forms	Disposal at conclusion of the trip (if no major incident)

Approved by Governing Body

Chair of Governors

Date _____

Headteacher

Date _____