SOUTH DOWNS
LEARNING TRUST

TRUST POLICY

Retention Schedule

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Approved by: Executive Headteacher

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Lead author: Senior Assistant Headteacher Operations

Revision Log (Last 5 changes)

Date	Version No	Brief Detail of Change
22nd January 2026	2	Page 6: Reference to 2015 Independent Inquiry into Child Sexual Abuse (IICSA) removed as this is now closed. Page 29: Reference to IICSA also removed from Section 5 (Pupil Management)
		Inserted reference to IICSA recommendation for retention into Section 5 (Pupil Management)
		Email retention time reduced
24th April 2024	1	Emails
24th April 2024	1	Subject Access Requests

OUR VISION

A community of primary and secondary academies that are the first choice for students and families in Sussex, with an outstanding reputation for high aspiration and high achievement.

Achieving success together

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South Downs Learning Trust Records Management Policy

The Trust recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution. Records provide evidence for protecting the legal rights and interests of the trust and its academies and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

• Scope

• Responsibilities

• Relationships with existing policies

1. Scope of the policy

1.1 This policy applies to all records created, received or maintained by staff of the trust in the course of carrying out its functions.

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

1.3 A small percentage of the records of the trust and/or academies will be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the County Archives Service.

2. Responsibilities

2.1 The trust has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Executive Headteacher and the relevant Headteacher/Head of School where the records relate to a particular academy within the trust or to a particular student attending an academy within the trust.

2.2 The person responsible for records management in the school will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. They will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.

2.3 Individual staff and employees must ensure that records for which they are responsible are accurate and are maintained and disposed of in accordance with the trust's records management guidelines.

3. Relationship with existing policies

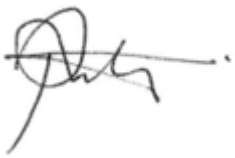
This policy has been drawn up within the context of:

Data Protection Policy

Freedom of Information Policy and Publication Scheme

Acceptable Use Policy

and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

Signed: __  _____

[Executive Headteacher]

How to Use the Records Retention Schedule

Locating a Record Series

This retention schedule has been split into sections to reflect the different areas and functions which produce records in a school. Click on each tab at the bottom of the screen to switch between each sheet.

The records in each section are listed under sub-headings, which reflect the general functions and activities that occur within that section. You can use these sub-headings to easily browse the schedule and locate the records associated with each activity.

A record series is a group of records that relate to and inform each other. For example, an employee's application form, references, DBS check, tax form, contract and correspondence relating to their employment are different types of records, but come together as a record series as their personnel file. Grouping records together in this way makes managing them easier, as the individual records can be treated as a whole and in the same way. Retention periods are therefore usually provided for record series, rather than different types of records.

The retention schedule contains the following column headings:

Record Series A basic description of the type of records or file.

Notes on Retention Any statutory provisions, legislation or specific business need that inform how long the records should be kept for.

Retention Period How long the records should be kept for and from what point this should be calculated.

Action What to do once the records reach the end of their retention period.

Personal data? Whether the records contain personal data or not.

Retention periods should be applied regardless of the format or media the records are in. If a record series is made up of paper records, digital files, and information held within databases, these should all be treated in the same way and have the same retention

Applying a Retention Period

Once you have located the record series you want and found its assigned retention period, you will then need to apply this. If the records are out of their retention period, you should carry out the action given in the retention schedule. This may be to destroy/delete the records, transfer them elsewhere, or you may have to review the records to see if their retention period needs to be extended.

Similarly, if the records that have reached the end of their retention period are part of an ongoing enquiry, investigation, claim, Subject Access Request (SAR), FOI request, or legal proceedings, these should not be destroyed/deleted until this has been concluded and the case is closed.

Before destroying records listed in the retention schedule, you should get this signed off/agreed by the relevant person. This may be the Headteacher, School Business Manager, IT Manager, or the creator of the records for example.

If the records contain personal data, sensitive or confidential information, you should make sure these are securely destroyed. For paper records this means shredding them before throwing them away. For digital records, you should speak to your IT Manager for advice on how to do this (clicking delete does not necessarily mean the record is gone, as it may just have moved location or still be recoverable).

You should keep a record of what you have destroyed/deleted and when. If your school has a destruction log or schedule you should ensure the records you are destroying/deleting are recorded on it.

SDLT Records Retention Schedule- 1. Governance, Funding and Financial Management of the Academy Trust

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Governance of the Academy Trust				
Governance Statement	No		Life of governance statement + 6 years	SECURE DISPOSAL
Articles of Association	No		Life of the Academy	
Memorandum of Association	No		This can be disposed of once the Academy has been incorporated	SECURE DISPOSAL
Memorandum of Understanding of Shared Governance among Schools	No	Companies Act 2006 section 355	Life of Memorandum of Understanding + 6 years	SECURE DISPOSAL
Constitution	No		Life of the Academy	
Special Resolutions to amend the Constitution	No		Life of the Academy	
Written Scheme of Delegation	No	Companies Act 2006 section 355	Life of Written Scheme of Delegation + 10 years	SECURE DISPOSAL
Directors – Appointment	No		Life of appointment + 6 years	SECURE DISPOSAL
Directors – Disqualification	No	Company Directors Disqualification Act 1986	Date of disqualification + 15 years	SECURE DISPOSAL
Directors – Termination of Office	No		Date of termination + 6 years	SECURE DISPOSAL

Annual Report – Trustees Report	No	Companies Act 2006 section 355	Date of report + 10 years	SECURE DISPOSAL
Annual Report and Accounts	No	Companies Act 2006 section 355	Date of report + 10 years	SECURE DISPOSAL
Annual Return	No	Companies Act 2006 section 355	Date of report + 10 years	SECURE DISPOSAL
Appointment of Trustees and Governors and Directors	Yes		Life of appointment + 6 years	SECURE DISPOSAL
Statement of Trustees Responsibilities	No		Life of appointment + 6 years	SECURE DISPOSAL
Appointment and removal of Members	No		Life of appointment + 6 years	SECURE DISPOSAL
Strategic Review	No		Date of the review + 6 years	SECURE DISPOSAL
Strategic Plan [also known as School Development Plans]	No		Life of plan + 6 years	SECURE DISPOSAL
Accessibility Plan	There may be if the plan refers to specific pupils	Limitation Act 1980 (Section 2)	Life of plan + 6 years	SECURE DISPOSAL

Board of Directors, Members Meetings and Governing Body				
Board of Directors				
Board Meeting Minutes	Could be if the minutes refer to living individuals	Companies Act 2006 section 248	Minutes must be kept for at least 10 years from the date of the meeting	OFFER TO ARCHIVES
Board Decisions	Could be if the decisions		Date of the meeting + a minimum of 10 years	OFFER TO ARCHIVES

	refer to living individuals			
Board Meeting: Annual Schedule of Business	No		Current year	SECURE DISPOSAL
Board Meeting: Procedures for conduct of meeting	No	Limitation Act 1980 (Section 2)	Date procedures superseded + 6 years	SECURE DISPOSAL
Committees				
Minutes relating to any committees set up by the Board of Directors	Could be if the minutes refer to living individuals		Date of the meeting + a minimum of 10 years	OFFER TO ARCHIVES
General Members' Meeting				
Records relating to the management of General Members' Meetings	Could be if the minutes refer to living individuals	Companies Act 2006 section 248	Minutes must be kept for at least 10 years from the date of the meeting[1]	OFFER TO ARCHIVES
Records relating to the management of the Annual General Meeting[2]	Could be if the minutes refer to living individuals	Companies Act 2006 section 248	Minutes must be kept for at least 10 years from the date of the meeting[3]	OFFER TO ARCHIVES
Governors				
Agendas for Governing Body meetings	May be data protection issues, if the meeting is dealing with confidential issues relating to staff		One copy should be retained with the master set of minutes. All other copies can be disposed of	SECURE DISPOSAL

Minutes of, and papers considered at, meetings of the Governing Body and its committees	May be data protection issues, if the meeting is dealing with confidential issues relating to staff			
Principal Set (signed)			Life of Academy	
Inspection Copies			Date of meeting + 3 years	SECURE DISPOSAL
Reports presented to the Governing Body	May be data protection issues, if the report deals with confidential issues relating to staff		Reports should be kept for a minimum of 6 years. However, if the minutes refer directly to individual reports, then the reports should be kept for the life of the Academy	SECURE DISPOSAL or
Meeting papers relating to the annual parents' meeting held under Section 33 of the Education Act 2002	No	Education Act 2002, Section 33	Date of the meeting + a minimum of 6 years	SECURE DISPOSAL
Trusts and Endowments managed by the Governing Body	No		PERMANENT	
Records relating to complaints dealt with by the Governing Body	Yes		Date of the resolution of the complaint + a minimum of 6 years then review for further retention in case of contentious disputes	SECURE DISPOSAL

Annual Reports created under the requirements of the Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002	No	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002 SI 2002 No 1171	Date of report + 10 years	SECURE DISPOSAL
Statutory Registers				
Register of Directors		Companies Act 2006	Life of the Academy + 6 years	SECURE DISPOSAL
Register of Directors' interests [this is not a statutory register]			Life of the Academy + 6 years	SECURE DISPOSAL
Register of Directors' residential addresses		Companies Act 2006	Life of the Academy + 6 years	SECURE DISPOSAL
Register of gifts, hospitality and entertainments		Companies Act 2006	Life of the Academy + 6 years	SECURE DISPOSAL
Register of members		Companies Act 2006	Life of the Academy + 6 years	SECURE DISPOSAL
Register of secretaries		Companies Act 2006	Life of the Academy + 6 years	SECURE DISPOSAL
Register of Trustees interests			Life of the Academy + 6 years	SECURE DISPOSAL
Declaration of Interests Statements [Governors] [this is not a statutory register]			Life of the Academy + 6 years	SECURE DISPOSAL

Funding and Finance				
Strategic Finance				
Statement of financial activities for the year	No		Current financial year + 6 years	SECURE DISPOSAL
Financial planning	No		Current financial year + 6 years	SECURE DISPOSAL

Value for money statement	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the management of VAT	No		Current financial year + 6 years	SECURE DISPOSAL
Whole of government accounts returns	No		Current financial year + 6 years	SECURE DISPOSAL
Borrowing powers	No		Current financial year + 6 years	SECURE DISPOSAL
Budget plan	No		Current financial year + 6 years	SECURE DISPOSAL
Charging and remissions policy	No		Date policy superseded + 3 years	SECURE DISPOSAL
Audit Arrangements				
Audit Committee and appointment of responsible officers	No		Life of the Academy	SECURE DISPOSAL
Independent Auditor's report on regularity	No		Financial year report relates to + 6 years	SECURE DISPOSAL
Independent Auditor's report on financial statements	No		Financial year report relates to + 6 years	SECURE DISPOSAL
Funding Agreements				
Funding Agreement with Secretary of State and supplemental funding agreements	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Funding Agreement – Termination of the funding agreement			Date of last payment of funding + 6 years	SECURE DISPOSAL
Funding Records – Capital Grant	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Funding Records – Earmarked Annual Grant (EAG)	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Funding Records – General Annual Grant (GAG)	No		Date of last payment of funding + 6 years	SECURE DISPOSAL

Per pupil funding records	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Exclusions agreement	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Funding records	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Gift Aid and Tax Relief	No		Date of last payment of funding + 6 years	SECURE DISPOSAL
Records relating to loans	No		Date of last payment on loan + 6 years if the loan is under £10,000 or date of last payment on loan + 12 years if the loan is over £10,000	SECURE DISPOSAL
Payroll and Pensions				
Maternity pay records	Yes	Statutory Maternity Pay (General) Regulations 1986 (SI1986/1960), revised 1999 (SI1999/567)	Current year + 3 years	SECURE DISPOSAL
Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes	Regulation 15 Retirement Benefits Schemes (Information Powers) Regulations 1995 (SI 1995/3103)	From the end of the year in which the accounts were signed for a minimum of 6 years	SECURE DISPOSAL
Management of the Teachers' Pension Scheme	Yes		Date of last payment on the pension + 6 years	SECURE DISPOSAL
Records relating to pension registrations	Yes		Date of last payment on the pension + 6 years	SECURE DISPOSAL
Payroll records	Yes		Date payroll run + 6 years	SECURE DISPOSAL
Risk Management and Insurance				

Insurance policies	No		Date the policy expires + 6 years	SECURE DISPOSAL
Records relating to the settlement of insurance claims	No		Date claim settled + 6 years	SECURE DISPOSAL
Employer's Liability Insurance Certificate	No		Closure of the school + 40 years	SECURE DISPOSAL
Endowment Funds and Investments				
Investment policies	No		Life of the investment + 6 years	SECURE DISPOSAL
Management of Endowment Funds	No		Life of the fund + 6 years	
Accounts and Statements				
Annual accounts	No		Current year + 6 years	STANDARD DISPOSAL
Loans and grants managed by the school	No		Date of last payment on the loan + 12 years then REVIEW	SECURE DISPOSAL
Student Grant applications	Yes		Current year + 3 years	SECURE DISPOSAL
All records relating to the creation and management of budgets, including the Annual Budget statement and background papers	No		Life of the budget + 3 years	SECURE DISPOSAL
Invoices, receipts, order books and requisitions, delivery notices	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the collection and banking of monies	No		Current financial year + 6 years	SECURE DISPOSAL
Records relating to the identification and collection of debt	No		Current financial year + 6 years	SECURE DISPOSAL
Contract Management				
All records relating to the management of contracts under seal	No	Limitation Act 1980	Last payment on the contract + 12 years	SECURE DISPOSAL

All records relating to the management of contracts under signature	No	Limitation Act 1980	Last payment on the contract + 6 years	SECURE DISPOSAL
Records relating to the monitoring of contracts	No		Current year + 2 years	SECURE DISPOSAL
Asset Management				
Inventories of furniture and equipment	No		Current year + 6 years	SECURE DISPOSAL
Burglary, theft and vandalism report forms	No		Current year + 6 years	SECURE DISPOSAL
Records relating to the leasing of shared facilities, such as sports centres	No		Current year + 6 years	SECURE DISPOSAL
Land and building valuations	No		Date valuation superseded + 6 years	SECURE DISPOSAL
Disposal of assets	No		Date asset disposed of + 6 years	SECURE DISPOSAL
Community School leases for land	No		Date lease expires + 6 years	SECURE DISPOSAL
Commercial transfer arrangements	No		Date of transfer + 6 years	SECURE DISPOSAL
Transfer of land to the Academy Trust	No		Life of land ownership then transfer to new owner	SECURE DISPOSAL
Transfers of freehold land	No		Life of land ownership then transfer to new owner	SECURE DISPOSAL
School Fund				
School Fund – Cheque books	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Paying in books	No		Current year + 6 years	SECURE DISPOSAL

School Fund – Ledger	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Invoices	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Receipts	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Bank statements	No		Current year + 6 years	SECURE DISPOSAL
School Fund – Journey books	No		Current year + 6 years	SECURE DISPOSAL
School Meals				
Free school meals registers	Yes		Current year + 6 years	SECURE DISPOSAL
School meals registers	Yes		Current year + 3 years	SECURE DISPOSAL
School meals summary sheets	No		Current year + 3 years	SECURE DISPOSAL

Policies, Frameworks and Overarching Requirements				
Information Security Breach Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Special Educational Needs Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Complaints Policy	No		Date policy superseded + 6 years	SECURE DISPOSAL
Risk and Control Framework	No		Life of framework + 6 years	SECURE DISPOSAL
Rules and Bylaws	No		Date rules or bylaws superseded + 6 years	SECURE DISPOSAL

Home School Agreements[1]	No		Date agreement revised + 6 years	SECURE DISPOSAL
Equality Information and Objectives (public sector equality duty) Statement for publication	No		Date of statement + 6 years	SECURE DISPOSAL

SDLT Records Retention Schedule- 2. Human Resources

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Recruitment				
All records leading up to the appointment of a new Head Teacher	Yes		Date of appointment + 6 years	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff – unsuccessful candidates	Yes		Date of appointment of successful candidate + 6 months	SECURE DISPOSAL
All records leading up to the appointment of a new member of staff – successful candidate	Yes		All relevant information should be added to the Staff Personal File (see below) and all other information retained for 6 months	SECURE DISPOSAL
Pre-employment vetting information – DBS Checks	No	DBS Code of Practice	The organisation should take a copy of the DBS certificate when it is shown to them by the individual and should be added to the Staff Personal File	SECURE DISPOSAL
Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	Yes		Where possible, these should be checked, and a note kept of what was seen and what has been checked. If it is felt necessary to keep copy documentation, then this should be added to the Staff Personal File	SECURE DISPOSAL

Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Yes	Home Office Right to Work guidance	Where possible, these documents should be added to the Staff Personal File, but if they are kept separately, then the Home Office requires that the documents are kept for termination of employment plus not less than 2 years	SECURE DISPOSAL
Records relating to the employment of overseas teachers	Yes		Where possible, these documents should be added to the Staff Personal File, but if they are kept separately, then the Home Office requires that the documents are kept for termination of employment plus not less than 2 years	SECURE DISPOSAL
Records relating to the TUPE process	Yes		Date last member of staff transfers or leaves the organisation + 6 years	SECURE DISPOSAL
Operational Staff Management				
Staff Personal File, including employment contract and staff training records	Yes	Limitation Act 1980 (Section 2)	Termination of employment + 6 years	SECURE DISPOSAL
Timesheets	Yes		Current year + 6 years	SECURE DISPOSAL
Annual appraisal/assessment records	Yes		Current year + 5 years	SECURE DISPOSAL
Records relating to the agreement of pay and conditions	No		Date pay and conditions superseded + 6 years	SECURE DISPOSAL
Training needs analysis	No		Current year + 1 year	SECURE DISPOSAL

Management of Disciplinary and Grievance Processes				
Allegation which is child protection in nature against a member of staff, including where the allegation is unfounded[1]	Yes	"Keeping children safe in education Statutory guidance for schools and colleges 2025"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2023"	Until the person's normal retirement age or 10 years from the date of the allegation, whichever is longer, then REVIEW	SECURE DISPOSAL These records must be shredded
Disciplinary Proceedings	Yes			
· Oral warning			Date of warning [2] + 6 months	SECURE DISPOSAL
· Written warning – level 1			Date of warning + 6 months	SECURE DISPOSAL
· Written warning – level 2			Date of warning + 12 months	SECURE DISPOSAL
· Final warning			Date of warning + 18 months	SECURE DISPOSAL
· Case not found			If the incident is child protection related, then see above; otherwise, dispose of at the conclusion of the case	SECURE DISPOSAL

Health and Safety				
Health and Safety policy statements	No		Life of policy + 3 years	SECURE DISPOSAL
Health and Safety risk assessments	No		Life of risk assessment + 3 years	SECURE DISPOSAL

Records relating to accident/injury at work	Yes		Date of incident + 12 years In the case of serious accidents, a further retention period will need to be applied	SECURE DISPOSAL
Accident reporting	Yes	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	The official Accident Book must be retained for 3 years after the last entry in the book. The book may be in paper or electronic format. The incident reporting form may be retained as below	
· Adults			Date of incident + 6 years	SECURE DISPOSAL
· Children			Date of birth of the child + 25 years	SECURE DISPOSAL
Control of Substances Hazardous to Health (COSHH)	No		Current year + 10 years then REVIEW	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have come into contact with asbestos	No		Last action + 40 years	SECURE DISPOSAL
Process of monitoring of areas where employees and persons are likely to have come into contact with radiation	No		Last action + 50 years	SECURE DISPOSAL
Fire precautions log books	No		Current year + 6 years	SECURE DISPOSAL

Fire risk assessments	No	Fire Service Order 2005	Life of the risk assessment + 6 years	SECURE DISPOSAL
Incident reports	Yes		Current year + 20 years	SECURE DISPOSAL
Email correspondence				
Staff (internal & external)	Yes	Once an email is longer than 1 year old it will automatically be deleted by Microsoft policy. Specific exceptions may exist e.g. for safeguarding purposes. Important correspondence forming part of a record series (e.g., safeguarding, HR, complaints) must be saved into the appropriate system before the 1-year auto-deletion occurs.	Deleted after 1 year	ELECTRONIC DISPOSAL
Student	No	Once an email is longer than 1 year old it will automatically be deleted by Microsoft policy.	Deleted after 1 year	ELECTRONIC DISPOSAL

SDLT Records Retention Schedule- 3. Management of the Academy

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Admissions				
All records relating to the creation and implementation of the School Admissions' Policy	No	School Admissions Code 2021	Life of the policy + 3 years then REVIEW	SECURE DISPOSAL
Admissions – if the admission is successful	Yes	School Admissions Code	Date of admission + 1 year	SECURE DISPOSAL
Admissions – if the appeal is unsuccessful	Yes	School Admissions Code	Resolution of case + 1 year	SECURE DISPOSAL
Register of admissions	Yes	School attendance: Departmental advice for maintained schools, Academies, independent schools and local authorities	Every entry in the admission register must be preserved for a period of 3 years after the date on which the entry was made[1]	REVIEW Schools may wish to consider keeping the admission register permanently, as often schools receive enquiries from past pupils to confirm the dates they attended the school

Admissions – Secondary Schools – Casual	Yes		Current year + 1 year	SECURE DISPOSAL
Proofs of address supplied by parents as part of the admissions process	Yes	School Admissions Code	Current year + 1 year	SECURE DISPOSAL
		Statutory Guidance for admission authorities, governing bodies, local authorities, schools' adjudicators and admission appeals panels		
Supplementary information form, including additional information such as religion and medical conditions	Yes			
· For successful admissions			This information should be added to the pupil file	SECURE DISPOSAL
· For unsuccessful admissions			Until appeals process completed	SECURE DISPOSAL

Head Teacher and Senior Management Team				
Log books of activity in the school maintained by the Head Teacher	There may be data protection issues if the log book refers to individual pupils or members of staff		Date of last entry in the book + a minimum of 6 years then REVIEW	These could be of permanent historical value and should be offered to the County Archives Service, if appropriate

Minutes of Senior Management Team meetings and meetings of other internal administrative bodies	There may be data protection issues if the minutes refers to individual pupils or members of staff		Date of the meeting + 3 years then REVIEW	SECURE DISPOSAL
Reports created by the Head Teacher or the Management Team	There may be data protection issues if the report refers to individual pupils or members of staff		Date of the report + a minimum of 3 years then REVIEW	SECURE DISPOSAL
Records created by Head Teachers, Deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the records refer to individual pupils or members of staff		Current academic year + 6 years then REVIEW	SECURE DISPOSAL
Correspondence created by Head Teachers, Deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	There may be data protection issues if the correspondence refers to individual pupils or members of staff		Date of correspondence + 3 years then REVIEW	SECURE DISPOSAL
Professional Development Plans	Yes		Life of the plan + 6 years	SECURE DISPOSAL

Operational Administration

Management of complaints	Yes		Date complaint resolved + 3 years	SECURE DISPOSAL
Records relating to the management of contracts with external providers	No		Date of last payment on contract + 6 years	SECURE DISPOSAL
Records relating to the management of software licences	No		Date licence expires + 6 years	SECURE DISPOSAL
General file series	No		Current year + 5 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and publication of the school brochure or prospectus	No		Current year + 3 years	STANDARD DISPOSAL
Records relating to the creation and distribution of circulars to staff, parents or pupils	No		Current year + 1 year	STANDARD DISPOSAL
Newsletters and other items with a short operational use	No		Current year + 1 year	STANDARD DISPOSAL
Visitors' books and signing in sheets	Yes		Current year + 6 years then REVIEW	SECURE DISPOSAL
Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	No		Current year + 6 years then REVIEW	SECURE DISPOSAL

SDLT Records Retention Schedule- 4. Property Management

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Property Management				
Title deeds of properties belonging to the school	No		These should follow the property, unless the property has been registered with the Land Registry	
Plans of property belonging to the school	No		These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold	
Leases of property leased by or to the school	No		Expiry of lease + 6 years	SECURE DISPOSAL
Records relating to the letting of school premises	No		Current financial year + 6 years	SECURE DISPOSAL
Business continuity and disaster recovery plans	No		Date the plan superseded + 3 years	SECURE DISPOSAL
All records relating to the maintenance of the school carried out by contractors	No		Current year + 6 years	SECURE DISPOSAL
All records relating to the maintenance of the school carried out by school employees, including maintenance log books	No		Current year + 6 years	SECURE DISPOSAL

Fleet Management				
The process of acquisition and disposal of vehicles through lease or purchase, e.g., contracts/leases, quotes, approvals	N	Limitation Act 1980 (Section 2)	Disposal of the vehicle + 6 years	SECURE DISPOSAL
The process of managing allocation and maintenance of vehicles, e.g., lists of who was driving the vehicles and when, maintenance	N	Limitation Act 1980 (Section 2)	Disposal of the vehicle + 6 years	SECURE DISPOSAL
Service logs and vehicle logs	N	Limitation Act 1980 (Section 2)	Life of the vehicle, then either to be retained for 6 years by school or to be returned to lease company	SECURE DISPOSAL
GPS tracking data relating to the vehicles	N	Limitation Act 1980 (Section 2)	Date of journey + 6 years	SECURE DISPOSAL

SDLT Records Retention Schedule- 5. Pupil Management

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Pupil's Educational Record				
Pupil's Educational Record required by The Education (Pupil Information) (England) Regulations 2005	Yes	The Education (Pupil Information) (England) Regulations 2005 SI 2005 No. 1437		
· Secondary		Limitation Act 1980 (Section 2)	Date of birth of the pupil + 25 years	SECURE DISPOSAL
Records relating to the management of exclusions	Yes		Date of birth of the pupil involved + 25 years	SECURE DISPOSAL
Management of examination registrations	Yes		The examination board will usually mandate how long these records need to be retained	
Examination results – pupil copies	Yes			
· Public			This information should be added to the pupil file	All uncollected certificates should be returned to the examination board
· Internal			This information should be added to the pupil file	

Child protection information held on pupil file	Yes	"Keeping children safe in education Statutory guidance for schools and colleges 2025"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2023"	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and then retained for the same period of time as the pupil file	SECURE DISPOSAL – these records MUST be shredded
Child protection information held in separate files	Yes	"Keeping children safe in education Statutory guidance for schools and colleges 2025"; "Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children 2023"	Date of birth of the child + 25 years then REVIEW The Independent Inquiry into Child Sexual Abuse (IICSA) recommended that records known to relate to child sexual abuse be retained for **75 years**. While this has not yet been enacted in statutory guidance, SDLT may choose to retain certain CSA-related records beyond the standard DOB + 25 years retention period where appropriate.	SECURE DISPOSAL – these records MUST be shredded
			This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the LA Social Services record	

Attendance				
Attendance registers	Yes	School attendance: Departmental advice for maintained schools, Academies, independent schools and local authorities	Every entry in the attendance register must be preserved for a period of 3 years after the date on which the entry was made	SECURE DISPOSAL
Correspondence relating to authorised absence		Education Act 1996 Section 7	Current academic year + 2 years	SECURE DISPOSAL
Special Educational Needs				
Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Education Act 1996Special Educational Needs and Disability Act 2001 Section 1	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL, unless the document is subject to a legal hold
Advice and information provided to parents regarding educational needs	Yes	Special Educational Needs and Disability Act 2001 Section 2	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL, unless the document is subject to a legal hold
Accessibility strategy	Yes	Special Educational Needs and Disability Act 2001 Section 14	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file]	SECURE DISPOSAL, unless the document is subject to a legal hold
Subject Access Request				
Subject Access Requests (SAR) documentation	Yes	All to be deleted as copies of required documentation will be kept in accordance with retention policy	3 years from delivery to subject.	SECURE DISPOSAL

SDLT Records Retention Schedule- 6. Curriculum Management

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Statistics and Management Information				
Curriculum returns	No		Current year + 3 years	SECURE DISPOSAL
Examination results (schools copy)	Yes		Current year + 6 years	SECURE DISPOSAL
SATs records –	Yes			
· Results			The SATS results should be recorded on the pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years	SECURE DISPOSAL
			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	

· Examination papers			The examination papers should be kept until any appeals/validation process is complete	SECURE DISPOSAL
Published Admission Number (PAN) reports	Yes		Current year + 6 years	SECURE DISPOSAL
Value added and contextual data	Yes		Current year + 6 years	SECURE DISPOSAL
Self-evaluation forms	Yes		Current year + 6 years	SECURE DISPOSAL
Implementation of Curriculum				
Schemes of work	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL
Timetable	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL

Class record books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL
Mark books	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL
Record of homework set	No		Current year + 1 year	It may be appropriate to review these records at the end of each year and allocate a further retention period, or, SECURE DISPOSAL
Pupils' work	No		Where possible, work should be returned to the pupil at the end of the academic year. If this is not the school's policy, then current year + 1 year	SECURE DISPOSAL

SDLT Records Retention Schedule- 6. Extra-Curricular Activities

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Educational Visits outside the Classroom				
Records created by schools in order to obtain approval to run an educational visit outside the classroom – Primary schools	No	Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 – "Legal Framework and Employer Systems" and Section 4 – "Good Practice".	Date of visit + 14 years	SECURE DISPOSAL
Records created by schools in order to obtain approval to run an educational visit outside the classroom – Secondary schools	No	Outdoor Education Advisers' Panel National Guidance website http://oeapng.info specifically Section 3 – "Legal Framework and Employer Systems" and Section 4 – "Good Practice".	Date of visit + 10 years	SECURE DISPOSAL

Parental consent forms for school trips where there has been no major incident.	Yes		Conclusion of the trip	Although the consent forms could be retained for date of birth + 25 years, the requirement for them being needed is low and most schools do not have the storage capacity to retain every single consent form issued by the school for this period of time
Parental permission slips for school trips – where there has been a major incident	Yes	Limitation Act 1980 (Section 2)	Date of birth of the pupil involved in the incident + 25 years. The permission slips for all the pupils on the trip need to be retained to show that the rules had been followed for all pupils	
Records relating to residential trips	Yes		Date of birth of youngest pupil involved + 25 years	SECURE DISPOSAL

SDLT Records Retention Schedule- 7. Central Government and Local Authority (LA)

Record Series (Basic file description)	Personal Data? (Data Protection Issues)	Notes on Retention (Statutory Provisions)	Retention Period	Action at end of administrative life of record
Local Authority				
Secondary transfer sheets (Primary)	Yes		Current year + 2 years	SECURE DISPOSAL
Attendance returns	Yes		Current year + 1 year	SECURE DISPOSAL
School census returns	No		Current year + 5 years	SECURE DISPOSAL

Central Government				
OFSTED reports and papers	No		Life of the report then REVIEW	SECURE DISPOSAL
Returns made to central government	No		Current year + 6 years	SECURE DISPOSAL
Circulars and other information sent from central government	No		Operational use	SECURE DISPOSAL