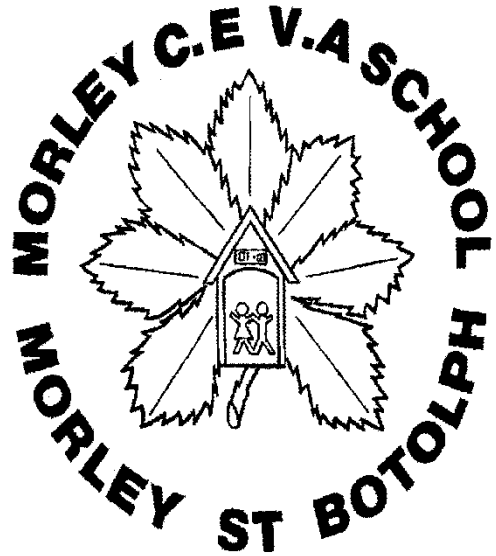
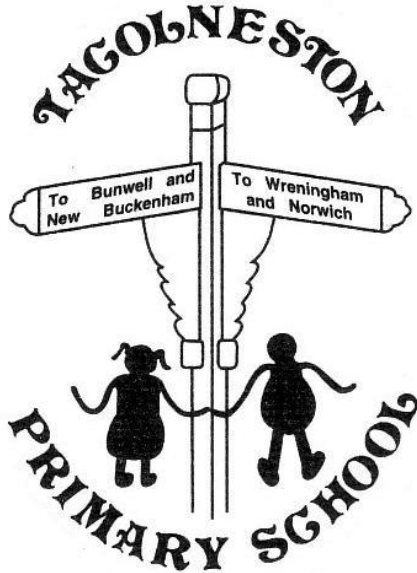


Tacolneston & Morley CE VA Primary Schools Federation



Work together, learn together, grow together...

Data Retention Policy

All policies at Tacolneston & Morley CE VA Primary Schools Federation should be taken as part of the overall strategy of the school and implemented within the context of our Safeguarding Policy and our vision, aims and values as Church of England Schools.

Agreed: Autumn 2019

Head Teacher:

Governor:

Review: Autumn 2020

Data Retention Policy

The Federation 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.

This policy does not form part of any employee's contract of employment and is not intended to have contractual effect. It does, however, reflect the Federation's current practice, the requirements of current legislation and best practice and guidance. It may be amended by the Federation from time to time and any changes will be notified to employees within one month of the date on which the change is intended to take effect. The Federation may also vary any parts of this procedure, including any time limits, as appropriate in any case.

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 Federation. The Federation's Data Protection Policy outlines its duties and obligations under the GDPR.

Retention Schedule

Information (hard copy and electronic) will be retained for at least the period specified in the attached retention schedule. When managing records, the Federation will adhere to the standard retention times listed within that schedule.

Paper records will be regularly monitored by the School Office Manager.

Electronic records will be regularly monitored by the School Office Manager.

The schedule is a relatively lengthy document listing the many types of records used by the Federation and the applicable retention periods for each record type. The retention periods are based on business needs and legal requirements.

Destruction Of Records

Where records have been identified for destruction they should be disposed of in an appropriate way. All information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such as potential litigation, complaints or grievances.

All paper records containing personal information, or sensitive policy information should be shredded before disposal where possible. All other paper records should be disposed of by an appropriate waste paper merchant. All electronic information will be deleted.

The Federation maintains a database of records which have been destroyed and who authorised their destruction. When destroying documents, the appropriate staff member should record in this list at least: -

- File title/description;
- Number of files; and

Tacolneston & Morley CE VA Primary Schools Federation

- Name of the authorising officer.

Archiving

Where records have been identified as being worthy of preservation over the longer term, arrangements should be made to transfer the records to the archives. A database of the records sent to the archives is maintained by the School Office Manager. The appropriate staff member, when archiving documents should record in this list the following information: -

- File reference (or other unique identifier);
- File title/description;
- Number of files; and
- Name of the authorising officer.

Transferring Information To Other Media

Where lengthy retention periods have been allocated to records, members of staff may wish to consider converting paper records to other media such as digital media or virtual storage centres (such as cloud storage). The lifespan of the media and the ability to migrate data where necessary should always be considered.

Responsibility And Monitoring

The Executive Headteacher has primary and day-to-day responsibility for implementing this Policy. The Data Protection Officer, in conjunction with the Federation is responsible for monitoring its use and effectiveness and dealing with any queries on its interpretation. The data protection officer will consider the suitability and adequacy of this policy and report improvements directly to management. Internal control systems and procedures will be subject to regular audits to provide assurance that they are effective in creating, maintaining and removing records. Management at all levels are responsible for ensuring those reporting to them are made aware of and understand this Policy and are given adequate and regular training on it.

Tacolneston & Morley CE VA Primary Schools Federation

Retention Guidelines		
Pupil		
Description	Retention Period	Disposal
Absence correspondence	Date of Absence + 2 years	Secure Diposal
Admission Registers	Date of last entry + 6 Years - Archive	Archive
Admissions (if appeal unsuccessful)	Resolution of case + 1 year	Secure Diposal
Admissions (Successful)	Admission + 1 year	Secure Diposal
Attendance Registers	Date of Register + 3 years	Secure Diposal
Child Protection Files	DOB + 25 years	Secure Diposal
Dinner Registers	Current Year + 3 years	Secure Diposal
Permission slip for trip (with major incident)	DOB of Pupil involved + 25 years	Secure Diposal
Permission slips for trips (no major incident)	Conclusion of the trip	Secure Diposal
Pupil files	Whilst child at school	
Pupils work	Current year + 1 year	Secure Diposal
Records created in course of contact with pupil	Current Year + 3 years	Secure Diposal
SATS results	Year of Exam + 6 years	Secure Diposal
School Meals Summary Sheet	Current Year + 3 years	Secure Diposal
SEN / IEP	DOB + 25 years	Secure Diposal
Statement of Educational Needs	DOB + 30 years	Secure Diposal
Staff		
Description	Retention Period	Disposal
Annual appraisals / assessment records	Current Year + 5 years	Secure Diposal
Interview notes and recruitment records	Date of Interview + 6 months	Secure Diposal
Maternity Pay Records	Current Year + 3 Years	Secure Diposal
Pre-employment vetting information including DBS	Date of check + 6 months	Secure Diposal
Proof of Identity (DBS)	Keep on personnel file	
Sick Pay	Current Year + 6 years	Secure Diposal
Staff Files	Temination + 7 Years	Secure Diposal
Warnings - Final	Date of Warning + 18 months	Secure Diposal
Warnings - Oral	Date of Warning + 6 months	Secure Diposal
Warnings - Written Level 1	Date of Warning + 6 months	Secure Diposal
Warnings - Written Level 2	Date of Warning + 12 months	Secure Diposal
Admin		
Description	Retention Period	Disposal
Attendance Returns	Current Year + 2 years	Secure Diposal
Census Returns	Current Year + 6 years	Secure Diposal
Circulars to Staff / Pupils / Parents	Current Year + 1 year	Secure Diposal
Inventories of equipment and Furniture	Current Year + 6 years	Secure Diposal
Newsletters	Current Year + 1 year	Review
PTA	Current Year + 6 years	Review
Records created to obtain approval for trip outside of	Date of visit + 14 years	
School brochure / prospectus	Current Year + 3 years	
Secondary Transfer Sheets	Current Year + 2 years	Secure Diposal
Visitor Book	Current Year + 2 Year	Review

Tacolneston & Morley CE VA Primary Schools Federation

Finance		
Description	Retention Period	Disposal
Annual Accounts	Current Year + 6 years	Secure Disposal
Annual Budget and Background Papers	Current Year + 6 years	Secure Disposal
Budget Reports	Current Year + 3 years	Secure Disposal
Contracts	Between 6 - 12 years - See guidelines	Secure Disposal
Copy orders	Current Year + 2 years	Secure Disposal
Debtors records	Current Year + 6 years	Secure Disposal
Delivery Documentation	Current Year + 6 years	Secure Disposal
Free School Meal Registers	Current Year + 6 years	Secure Disposal
Invoices etc	Current Year + 6 years	Secure Disposal
Order Books	Current Year + 6 years	Secure Disposal
School Fund - All records	Current Year + 6 years	Secure Disposal
Health and Safety		
Description	Retention Period	Disposal
Accessibility Plans	Current Year + 6 years	Secure Disposal
Contractors Reports	Current Year + 6 years	
Incident Reports	Current Year + 20 years	Secure Disposal
Process of Monitoring areas of Asbestos	Last action + 40 years	Secure Disposal
Pupil Accident	DOB + 25 years	Secure Disposal
Records relating to Accident / Injury at work	Date of incident + 12 years (or 7 ??)	Secure Disposal
Risk Assessments	Current Year + 3 years	Secure Disposal
Management		
Description	Retention Period	Disposal
Correspondence created by HT /SLT/Admin	Date of Corresepndence + 3 Years	Secure Disposal
Minutes of SLT / Admin Meetings	Date of Meeting + 5 years	
OFSTED Reports	Replace with new report	
Professional Development Plans	Closure + 6 years	Secure Disposal
Reports made by HT or SLT	Date of Report + 3 years	
School Development Plans	Closure + 6 years	Review