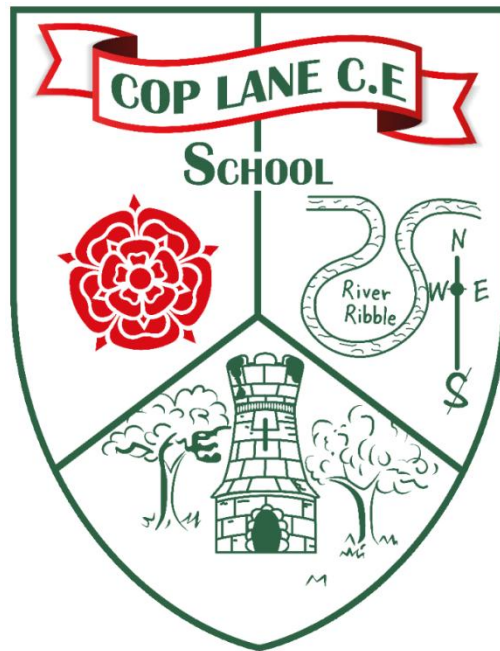


Cop Lane C.E Primary School



Record Management and Retention Policy – Summer 2026

This policy is embedded in our school's mission statement and distinctive Christian vision:

A welcoming Christian community, committed to one another, giving our very best at all times.

Our church school is a welcoming and caring Christian family where everyone is valued and supported so that they can flourish. We aim to instill a lifelong love of learning and nurture everyone's individual talents. Through Jesus Christ, our aspirations, hopes and dreams can be achieved.

'I can do all things through Christ who strengthens me.'

Philippians 4.13

Cop Lane C.E. Primary School is committed to ensuring that personal data is:

- stored securely
- retained only for as long as necessary
- disposed of safely and confidentially
- managed in line with **UK GDPR**, the **Data Protection Act 2018**, and other relevant legislation

This policy sets out how long different categories of records will normally be kept and how they will be reviewed, archived, transferred, or securely destroyed.

Aims

This policy aims to:

- ensure records are kept for the correct length of time
- support legal compliance and good record management
- protect pupils, staff, governors, and families by handling information appropriately
- reduce unnecessary storage of personal data
- ensure records are disposed of securely when no longer required

Scope

This policy applies to:

- paper records
- electronic records
- emails
- photographs and images
- CCTV footage
- records held on school management information systems
- records held by staff in the course of their duties

It applies to all staff, governors, and anyone acting on behalf of the school.

Responsibilities

Headteacher

The Headteacher is responsible for:

- overseeing implementation of this policy
- ensuring staff understand their responsibilities
- making sure records are managed securely

Data Protection Officer

The DPO is responsible for:

- advising on compliance with data protection law
- supporting the school with retention and disposal arrangements
- reviewing this policy periodically

All staff

All staff are responsible for:

- filing records correctly
- following retention periods
- not keeping unnecessary personal data
- disposing of records securely
- reporting any data incidents immediately

General principles

The school will:

- keep records only as long as needed for the purpose for which they were collected
- retain information where required by law, safeguarding needs, insurance purposes, or litigation
- archive records of permanent or long-term historical value
- review records regularly
- ensure secure disposal of paper and electronic records

If records are subject to a legal hold, complaint, investigation, or safeguarding concern, they must **not** be destroyed until the matter is fully resolved and the school has confirmed that disposal is appropriate.

Secure disposal

Paper records

Paper records containing personal or sensitive information should be:

- shredded
- placed in confidential waste bins
- disposed of by an approved confidential waste contractor

Electronic records

Electronic records should be:

- permanently deleted where appropriate
- removed from active systems and backups in line with IT procedures
- disposed of securely so that they cannot reasonably be recovered

Archiving

Records of historical or permanent value may be archived rather than destroyed.

Retention schedule

Pupil records

Record type	Retention period	Action after retention period
Pupil educational record	While the pupil remains at the school, then transferred to the next school	Transfer to receiving school
Pupil file after transfer	1 year after transfer	Review and securely destroy if no longer required
Admissions register	6 years from date of entry	Securely destroy
Attendance register	6 years from date of entry	Securely destroy
Exclusion records	While the pupil remains at the school, plus 1 year	Securely destroy
Correspondence relating to absence	Current academic year plus 2 years	Securely destroy
Assessment data and reports	Current academic year plus 1 year, unless needed longer	Review and securely destroy
SEN files and EHCP-related records	Whilst the pupil remains at the school	Transfer with the pupil's record

Record type	Retention period	Action after retention period
Child protection records held on pupil file	Until the child is 25, then review	Securely destroy if no longer required
Child protection records relating to child sexual abuse	Retain for longer period, potentially indefinitely, subject to safeguarding guidance	Review in line with safeguarding requirements
Pupil work	End of academic year, or current year plus 1 year if retained	Securely destroy or return to pupil
Consent forms for trips with no serious incident	End of trip or end of academic year	Securely destroy
Consent forms for trips involving a serious incident	Date of birth of pupil plus 25 years	Securely destroy

Staff records

Record type	Retention period	Action after retention period
Recruitment records for unsuccessful applicants	12 months after notifying candidates	Securely destroy
Recruitment records for successful applicants	Added to personnel file	Retain in line with personnel file
Personnel file	6 years after employment ends	Securely destroy

Record type	Retention period	Action after retention period
Right to work documents	2 years after employment ends	Securely destroy
DBS certificate details	As soon as practicable after recording outcome, normally within 6 months	Securely destroy
Contracts of employment and changes to terms	6 years after employment ends	Securely destroy
Disciplinary records	6 years after employment ends	Securely destroy
Grievance records	6 years after employment ends	Securely destroy
Sickness absence records	3 to 6 years depending on pay and purpose	Securely destroy
Annual appraisal records	Current year plus 6 years	Securely destroy
CPD/training records	As long as relevant, usually 6 years after employment ends	Securely destroy
Safeguarding or child-related training records	Date of training plus 40 years	Securely destroy

Governance records

Record type	Retention period	Action after retention period
Governing board minutes	Permanent, or at least 10 years	Archive or transfer to local archives
Agendas linked to minutes	Keep with minutes	Archive or destroy with minutes
Register of attendance	6 years	Securely destroy
Register of interests	6 years after end of appointment	Securely destroy
Governor appointment records	6 years after appointment ends	Securely destroy
Governor training records	6 years after appointment ends	Securely destroy
Policy documents approved by governors	Until superseded, then plus 3 years	Securely destroy

Health and safety records

Record type	Retention period	Action after retention period
Health and safety policy statements	Life of policy plus 3 years	Securely destroy

Record type	Retention period	Action after retention period
Risk assessments	Life of assessment plus 3 years	Securely destroy
RIDDOR records	3 years from incident date	Securely destroy
Accident book entries involving adults	3 years after last entry	Securely destroy
Accident book entries involving pupils under 18	Until the pupil reaches age 21	Securely destroy
COSHH records	40 years from last entry	Securely destroy
Asbestos records	40 years from last action/entry	Securely destroy
Fire precaution logbooks	6 years	Securely destroy

Financial records

Record type	Retention period	Action after retention period
Payroll records	6 years after end of tax year	Securely destroy

Record type	Retention period	Action after retention period
P60s, P45s, tax forms	6 years	Securely destroy
Invoices, receipts, order books, requisitions	6 years from financial year end	Securely destroy
Bank statements and reconciliations	6 years from financial year end	Securely destroy
Annual accounts	6 years	Securely destroy
Budget planning records	Life of budget plus 3 years	Securely destroy
School fund records	6 years	Securely destroy
Free school meals registers used for funding	6 years	Securely destroy
Pupil premium records	Pupil leaves school plus 6 years	Securely destroy

Other records

Record type	Retention period	Action after retention period
CCTV footage	30 to 60 days, unless required for investigation	Overwrite or securely delete
Newsletters and circulars	1 year, with one archive copy if desired	Securely destroy or archive
School prospectus	Current academic year plus 3 years	Securely destroy
School privacy notices	Until superseded plus 6 years	Securely destroy
Referral forms	While referral is current	Securely destroy
Contact data sheets	Current academic year, then review	Securely destroy if no longer active
Emails	Retain according to content and business need; not as a default archive	Review and file or delete appropriately

Managing emails

Emails are not a record category in themselves. Their retention depends on content.

Staff should:

- file important emails in the relevant record area
- delete routine emails when no longer needed
- not use personal email accounts for school business
- avoid creating private archives on personal devices or storage media

Emails relating to:

- safeguarding
- complaints
- HR
- finance
- admissions
- legal matters

should be retained in line with the relevant category in this policy.

Transfer of pupil records

When a pupil moves to another school, the school will:

- transfer the pupil's educational record securely and promptly
- retain a copy only where necessary for a short period to deal with queries or outstanding matters
- ensure records are not altered inappropriately before transfer

Data reviews

The school will review records regularly to identify:

- records due for destruction
- records suitable for archiving
- records subject to legal hold or safeguarding concerns

A record destruction log should be maintained showing:

- file reference
- record description
- number of files
- date destroyed
- method of destruction
- name of the person authorising destruction

Monitoring and review

This policy will be:

- reviewed annually, or sooner if required by changes in law or guidance
- monitored by the DPO and Headteacher
- shared with all relevant staff

Related policies

This policy should be read alongside:

- Data Protection Policy
- Cyber Security Policy
- Safeguarding Policy
- Online Safety Policy
- Records Disposal Log

This policy was adopted by the Governing Board in May 2026.

It will be reviewed again in May 2027.

Signed: *I. P. Ashmore*

Date: 14.05.26