Appendix One – Retention Schedule

Where an entry is marked with this symbol , consideration should be given to the potential for legal challenges. Where a legal challenge is possible or pending at the end of the initial retention period, records may be retained for an additional six years, in line with the Limitations Act 1980.

Pupil Records

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Primary school pupil file – including formal academic attainment	Yes	Until the pupil leaves the school.	Statutory	The Education (Pupil Information) (England) Regulations 2005	Securely transfer to the onward setting.
Secondary school pupil file – including formal academic attainment	Yes	Until the pupil's 25th birthday. (18 + 6 years as an adult)	Statutory	The Education (Pupil Information) (England) Regulations 2005 Limitations Act 1980	Secure disposal If a pupil leaves, transfer the records to the onward setting
Pupil work (e.g. exercise books, homework, learning app data, etc.)	Yes	Given to pupils at the end of each year. Where not possible, retain for the current year + 1.	Business Need		Secure disposal
Special educational needs and disabilities (SEND) (Inc. reviews and education, health, and care (EHC) plans)	Yes	End of EHCP + 6 years or until the pupil's 25th birthday.	Statutory	The Special Educational Needs and Disability Regulations 2014	Secure disposal If a pupil leaves, transfer the records to the onward setting
Personal Education Plans (PEPS) (For looked after children)	Yes	Date of birth of the pupil + 25 years.	Statutory	Children and Young Persons Act 2008 Children and Social Work Act 2017	Secure disposal
Medical administration records	Yes	Retained in pupil file or until the pupil's 25th birthday.	Best Practice	NHS Records Management Code of Practice	Secure disposal

Safeguarding and Child Protection Records

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Primary school safeguarding & child protection files ▲	Yes	Until the pupil leaves the school.	Statutory	The Education (Pupil Information) (England) Regulations 2005. DfE Keeping Children Safe in Education	Securely transfer to the onward setting as a separate file or in a sealed envelope within the pupil's file
Secondary school safeguarding & child protection files ▲	Yes	Until the pupil's 25th birthday. (18 + 6 years as an adult)	Statutory	The Education (Pupil Information) (England) Regulations 2005 DfE Keeping Children Safe in Education	Secure disposal
Child sexual abuse files ▲	Yes	Until the child's 75th birthday.	Statutory	The Report of the Independent Inquiry into Child Sexual Abuse (IICSA) recommendation on access to records	We expect this information to be held by the Local Authority as the lead. If this is not the case, records should be held by the final school setting
Allegations concerning child protection against a member of staff ▲ (including unfounded)	Yes	Until the staff member's normal retirement age, or 10 years from the date of the allegation, whichever is later.	Statutory	DfE Keeping Children Safe in Education	Secure disposal
Complaints: negligence or safeguarding ▲ (dealt with by Governing Body)	Yes	Date the complaint resolved + 15 years.	Best Practice		Secure disposal
Complaints: child sexual abuse ▲ (dealt with by Governing Body)	Yes	Date the complaint resolved + 75 years.	Best Practice		Secure disposal

Staff and HR Information

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Personnel files for Staff, Governors and Supply staff - **Appointment/interview records** - **Performance Management records**	Yes	Termination date + 6 years	Statutory	Limitations Act 1980	Secure disposal
Timesheets & pay records	Yes	End of the tax year + 3 years.	Statutory	PAYE and payroll for employers: Keeping records	Secure disposal
Sickness and leave of absence records	Yes	Current year + 3 years.	Best Practice		Secure disposal
Appointment of Headteacher records	Yes	Date of appointment + 6 years.	Best Practice		Secure disposal
Unsuccessful candidates	Yes	Date of appointment + 6 months.	Best Practice		Secure disposal
Volunteers	Yes	Date last worked in school + 3 years.	Best Practice		Secure disposal

School Operations and Governance

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Attendance records	Yes	Register – Date of entry + 6 years. Back-up – End of school year + 6 years.	Statutory	School Attendance (Pupil Registration) (England) Regulations 2024	Secure disposal
Admissions data	Yes	Date of admission + 6 years.	Statutory	School Attendance (Pupil Registration) (England) Regulations 2024	Consider for permanent preservation
Unsuccessful admission applications	Yes	Resolution of case + 1 year.	Statutory	School Admissions Code.	Secure disposal
School trips	Yes	Date of visit + 6 years.	Best Practice	Health and safety on educational visits	Secure disposal

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
		If an incident occurred, retain permission slips & incident report in the pupil file.			
Consent forms (e.g school trip or photo consent)	Yes	Current year + 1 year.	Business Need		Secure disposal
List of pupils on free school meals	Yes	Current financial year + 3 years.	Business Need		Secure disposal
Photographs and videos – internal use (displays, ID, pupil work, etc.)	Yes	Current year + 1 year.	Business Need		Given to the pupil or secure disposal
Photographs and videos – external use (publications, marketing, social media etc.)	Yes	Current year + 3 years.	Business Need		Consider for permanent preservation
Governing board meeting minutes (maintained schools)	Yes	Minutes must be kept for at least 10 years from the date of the meeting	Business Need		Secure disposal
Memoranda of understanding	No	Life of the academy + 6 years.	Statutory	Companies Act 2006	Routine disposal
Complaint files	Yes	Date complaint resolved + 3 years.	Business Need		Secure disposal
Curriculum records	No	Current year + 1 year.	Statutory	Education (Pupil Information) (England) Regulations 2005	Routine disposal
Ofsted reports	No	Life of the report then review.	Business Need		Routine disposal
Policy documents	No	Until superseded + 3 years.	Business Need		Routine disposal
Visitor management	Yes	Academic year + 1 year.	Business Need		Secure disposal

Health and Safety:

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Accessibility plans	Yes	Life of plan + 6 years.	Statutory	Limitations Act 1980	Secure disposal
Accident records	Yes	Date of accident + 3 years. (Serious accidents involving pupils should be retained in the pupil file).	Statutory	Social Security (Claims and Payments) Regulations 1979	Secure disposal
Risk assessments (for substances hazardous to health)	No	Date of assessment + 5 years.	Statutory	The Control of Substances Hazardous to Health Regulations 2002	Routine disposal
Fire assessments	No	Life of the risk assessment + 6 years.	Statutory	Fire Service Order 2005	Secure disposal

Property and Finance

Information Asset Name	Personal data	Retention Period	Basis	Reference	Action or disposal method
Maintenance records	No	End of year + 6 years.	Statutory	Record keeping (VAT Notice 700/21)	Routine disposal
Contracts	No	Contract end + 6 years.	Statutory	Limitations Act 1980	Routine disposal
Petty cash	No	End of financial year + 6 years.	Statutory	Limitations Act 1980	Routine disposal
VAT records	No	End of financial year + 6 years.	Statutory	Record keeping (VAT Notice 700/21)	Routine disposal

Anything not included within this schedule can be reviewed on Schools Toolkit - Information and Records Management Society Ltd