

Retention Schedule January 2023



SCHOOL DETAILS	
School Name	Bickleigh Down CE (Aided) Primary
Address	School Drive, Woolwell. PL6 7JW
Data Protection Officer Email	Annette.Henry@devon.gov.uk
Telephone	1752301837

Records relating to HR/Personnel	Data Protection Issue Y/N?	Statutory Provisions	Retention Period	Action at end of administrative life of record
Staff personnel files	Y		Termination + 6 years	Secure disposal
Interview notes and recruitment records - unsuccessful candidate	Y		Date of interview notes + 6 months	Secure disposal
Interview notes and recruitment records - successful candidate			All relevant details added to personnel file. Other information held for 6 months.	Secure disposal
Sick pay, timesheets	Y	Financial Regulations	Current + 6 years	Secure disposal
Pre-employment vetting information (DBS)	Y	DBS Update service June 2014; Keeping children safe in education 2015	Date of check + 6 months	Secure disposal
Disciplinary Proceedings	Y		Where the warning relates to CP issues see CP guidance	
Oral Warning	Y		Date of warning + 6 months	Secure disposal
Written Warning - level one	Y		Date of warning + 6 months	Secure disposal
Written Warning - level two	Y		Date of warning + 12 months	Secure disposal
Final Warning	Y		Date of warning + 18 months	Secure disposal
Case not found	Y		Where the warning relates to CP issues see CP guidance otherwise dispose of all the conclusion of the case.	Secure disposal
Records relating to accident/injury at work	Y		Date of incident + 12 years	In case of serious accident a further retention period will need to be applied. Secure disposal
Annual appraisal and assessment records	Y		Current year + 5 years	Secure disposal
Maternity pay records	Y	Statutory Maternity Pay (General) Regs 1986	Current year + 3 years	Secure disposal
Records held under retirement benefits schemes (Information Powers) Regs 1995	Y		Current year + 6 years	Secure disposal
Proof of identity collected as part of checking	Y		Where possible these should be checked and a note of what was checked placed on personnel file.	Secure disposal
Qualification certificates	Y		Records dated and kept on personnel file until termination of employment + 2 years	Secure disposal
Records Relating to Child Protection	Data Protection Issue Y/N?	Statutory Provisions	Retention Period	Action at end of administrative life of record

CP information held on pupil file	Y	Keeping Children Safe in Education 2015	Should be placed in a sealed envelope in the pupil file and retained for the same time as the file.	Secure disposal
CP information held electronically	Y	Keeping Children Safe in Education 2015	DOB + 25 years	Secure disposal
Allegation of CP nature against a member of staff, including where the allegation is unfounded.	Y	Employment Practices Code: Supplementary Guidance 2.13.1 (Records of Disciplinary Grievance). Education Act 2002 Guidance "Dealing with Allegations of Abuse against Teachers and Other Staff" November 2005, Keeping children safe in education 2015	Until the person's normal retirement age or 10 years from the date of the allegation whichever is the longer. Allegations that are found to be malicious should be removed from personnel files.	Secure disposal
Records Relating to Governors	Data Protection Issue Y/N?	Statutory Provisions	Retention Period	Action at end of administrative life of record
Principal set of minutes (signed)	N		Permanent	Must be available in school for 6 years from the meeting. Can then be archived/stored elsewhere.
Inspection copies of minutes	N		Date of meeting + 3 years	Secure disposal
Agendas	N		One copy retained with master set of minutes. All other copies disposed of.	Secure disposal
Reports	N		Date of report + 6 years	Retain in school for 6 years from report date. Can consider archiving/storing anything important.
Annual parents' meeting papers	N		Date of meeting + 6 years	Retain in school for 6 years from report date. Can consider archiving/storing anything important.
Instruments of Government	N		Permanent	Retain in school whilst school open. Can then be archived/stored elsewhere.
Trusts & Endowments	N		Permanent	Retain in school whilst operationally required. Can then be archived/stored elsewhere.
Action Plans	N		Date of action plan + 3 years	Secure disposal
Policy documents	N		Expiry of policy + 3 years	Retain in school whilst policy operational (includes if the expired policy is part of a past decision making process).
Complaints files	Y		Date of complaint resolution + 6 years	Review for further retention in the case of contentious disputes. Secure disposal.
Annual reports required by DfE	N	Education (Governors' Annual Reports)(England)(Amendment) Regulations 2002	Date of report + 10 years	Secure disposal
Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	N		Current year + 3 years	Secure disposal
Records Relating to School Management	Data Protection Issue Y/N?	Statutory Provisions	Retention Period	Action at end of administrative life of record
Minutes of the senior management team and other internal administrative bodies	Y		Date of meeting + 5 years	Retain in school for 5 years from meeting date. Can consider archiving/storing anything important.
Reports made by the head teacher or management team	Y		Date of report + 3 years	Retain in school for 3 years from report date. Can consider archiving/storing anything important.

Records created by head teachers, deputy head teachers and other members of staff with administrative responsibilities.	Y		Closure of file + 6 years	Secure disposal
Correspondence created by head teachers, deputy head teachers and other members of staff with administrative responsibilities	Potentially		Date of correspondence + 3 years	Secure disposal
Professional development plans	Y		Closure of file + 6 years	Secure disposal
School development plans	N		Closure of file + 6 years	Review for further retention. Secure disposal.
Records Relating to Pupils	Data Protection Issue Y/N?	Statutory Provisions	Retention Period	Action at end of administrative life of record
Admission Registers	Y	School attendance DFE advice	Retain in school for 7 years from entry.	Retain in school for 7 years from entry. Can consider archiving these records if school has the facility.
All records relating to the creation and implementation of the School's Admissions Policy	N	School Admissions Code	Life of the policy + 3 years	Secure disposal
Admissions - if the admission appeal was successful	Y		Admission + 1 year	Secure disposal
Admissions - if the appeal was unsuccessful	Y		Resolution of case + 1 year	Secure disposal
Admissions - secondary schools - casual	Y		Current year + 1 year	Secure disposal
Proof of address supplied by parents as part of the admissions process	Y	School Admissions Code	Current year + 1 year	Secure disposal
Supplementary information form including additional information such as religion, medical conditions supplied as part of the admissions process	Y		As per the corresponding admission record	Secure disposal