RECORDS MANAGEMENT POLICY AND RETENTION SCHEDULE

Blessed Edward Bamber Catholic Multi Academy Trust

VERSION: 2.0

ADOPTED: AUTUMN TERM 25

NEXT REVISION: AUTUMN TERM 27

Blessed Edward Bamber
Catholic Multi Academy Trust

Corinthians 4:2

Now it is required that those who have been given a trust must prove faithful.

Version Control

Date of last review	AUTUMN TERM 2025
Date of next review	AUTUMN TERM 2027
Review period	EVERY 2 YEARS
Policy Status	
Owner	
Approver	
Version	2.0

Previous versions

Version	Author	Date	Changes
2.0		Autumn 25	Updated guidelines based on IRMS Toolkit

This is a Trust-Wide Policy which applies to all academies within the Trust

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Introduction

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 provide evidence for demonstrating performance and accountability.

This policy and records retention schedule has been developed based on guidance provided by the Information and Records Management Society (IRMS)

Scope

This policy applies to all records created, received or maintained by permanent and temporary staff of the trust in the course of carrying out its functions. *This also applies to* any agents, contractors, consultants or third parties acting on behalf of the trust.

Records are defined as all those documents which facilitate the business carried out by the trust 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 electronic format.

Responsibilities

The governing body of a trust has a statutory responsibility to maintain the records and record keeping systems in accordance with the regulatory environment specific to the trust. The responsibility is usually delegated to the headteacher of each school.

The person responsible for day-to-day operational management in schools will give guidance on 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.
Information will be managed in line with the Records Retention Schedule. This will help to ensure that it can meet Freedom of Information requests and respond to requests to access personal data under data protection legislation (Subject Access Requests).

Individual staff and employees must ensure, with respect to records for which they are responsible, that they:

- Manage the school's records consistently in accordance with the trust's policies and procedures;
- Properly document their actions and decisions;
- Hold personal information securely;
- Only share personal information appropriately and do not disclose it to any unauthorised third party;
- Dispose of records securely in accordance with the trust's Records Retention Schedule.
- Information will be assessed and when it is no longer required, necessary or is to be destroyed or deleted in line with the retention schedule.
- The security of data and appropriate measures will be implemented to protect breach, loss or unauthorised sharing of the information.

Review

This policy will be reviewed annually to ensure it remains up to date with legal requirements, best practices, and operational needs.

Appendices to Records Management and Retention Schedule

Appendix 1 – Records Management Schedule with Retention Periods

Contracts

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK1.1	All records relating to the management of contracts under seal	No	Last payment on the contract + 12 years or end of contract + 12 years, whichever is the longer	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK1.2	All records relating to the management of contracts under signature	No	Last payment on the contract + 6 years or end of contract + 6 years whichever is the longer	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK1.3	Records relating to the management of contracts with external providers	No	End of contract + 6 years or date of last payment on contract + 6 years whichever is the longer		SECURE DISPOSAL	
IRMSTK1.4	Records relating to the monitoring of contracts	No	End of the contract or until the final payment has been made whichever is the longer		SECURE DISPOSAL	
IRMSTK1.5	All records relating to the maintenance of the school carried out by contractors	No	Current year + 6 years.		SECURE DISPOSAL	This may vary on the type of maintenance. Records relating to rewiring, major alterations etc

						must be retained in the health and safety file whilst the building belongs to the school and must be passed onto any new owners if the building is leased or sold.
IRMSTK1.6	All records relating to the maintenance of the school carried out by school employees, including maintenance log books	No	Life of equipment + 6 years. Alterations to wiring and major modifications must be entered in to the health and safety file		SECURE DISPOSAL	
IRMSTK1.7	Records relating to the management of software licences	No	Date licence expires + 6 years		SECURE DISPOSAL	

Education Management

Management Information

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK2.1	Published Admission Number (PAN) reports	Yes	Current year + 6 years		SECURE DISPOSAL	
IRMSTK2.2	Curriculum returns	No	Current year + 3 years		SECURE DISPOSAL	
IRMSTK2.3	Self-evaluation forms	Yes	Current year + 6 years		SECURE DISPOSAL	

IRMSTK2.4	Self Evaluation Forms - External moderation	Yes	Until superseded		SECURE DISPOSAL	
IRMSTK2.5	Self Evaluation Forms - Internal moderation	Yes	Academic year plus one academic year		SECURE DISPOSAL	
IRMSTK2.5	Value added and contextual data	Yes	Current year + 6 years		SECURE DISPOSAL	

Policies and Frameworks

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK3.1	Complaints policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.2	Data Protection policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.3	Freedom of Information Policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.4	Information Security Breach Policy	No	Life of the policy or policy superseded + 3 years. If major		SECURE DISPOSAL	

			changes are made to the policy, then an archive copy of previous policies should be retained			
IRMSTK3.5	Special Educational Needs policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.6	Equality and Information policy	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.7	Risk and Control Framework	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	
IRMSTK3.8	Rules and Bylaws	No	Life of the policy or policy superseded + 3 years. If major changes are made to the policy, then an archive copy of previous policies should be retained		SECURE DISPOSAL	

Strategy

Ref	Retention Period Description	Personal	Retention Period	Statutory Provisions	Disposal	Notes

		Information				
IRMSTK4.1	Strategic Review	No	Life of the review or until review superseded + 3 years. If major changes are made to the review, then an archive copy of previous review should be retained		SECURE DISPOSAL	
IRMSTK4.2	School Development Plans	No	Life of plan or until plan superseded + 3 years. If major changes are made to the plan then an archive copy of previous plans should be retained		SECURE DISPOSAL	
IRMSTK4.3	Accessibility Plan	No	Life of plan or plan superseded + 3 years the review. If major changes are made to the plan then an archive copy of previous policies should be retained	Equality Act 2010	SECURE DISPOSAL	

Examinations

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK5.3	Examination Results Pupil Copies: Public	Yes	Added to pupil file		As per instructions from Examination Board	
IRMSTK5.4	Examination Results Pupil Copies: Internal	Yes	Added to pupil file			
IRMSTK5.5	Examination results (schools copy)	Yes	Current year +6		SECURE DISPOSAL	
IRMSTK5.6	Management of examination registrations	Yes	Exam board mandate		SECURE DISPOSAL	

Extra Curriculum and Miscellaneous Activities

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK6.2	Records created by schools in order to obtain approval to run an education visit outside the classroom (secondary school)	No	Date of visit + 15 years	Limitation Act 1980	SECURE DISPOSAL	

IRMSTK6.3	Parental consent forms for school trips where there has been no major incident	Yes	Conclusion of the trip.		SECURE DISPOSAL	
IRMSTK6.4	Parental permission slips for school trips where there has been a major incident	Yes	Date of birth of the pupil involved in the incident + 25 years or 15 years after the incident whichever is the longer. 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	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK6.5	Records relating to residential trips	Yes	Date of birth of youngest pupil involved + 25 years or if there is a major incident then date of incident + 15 years whichever is the longer	Limitation Act 1980	SECURE DISPOSAL	

Finance

Funding

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK7.01	Funding Agreement with Secretary of State and supplemental funding agreements [Where there is multi-Academy governance.]	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
IRMSTK7.02	Funding Agreement Termination of the funding agreement	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	Either party may give not less than 7 financial years written notice to

						terminate the Agreement, such notice to expire on 31 August. Or, where the Academy has significant financial issues or is insolvent, the Agreement can be terminated by the Secretary of State to take effect on the date of the notice.
IRMSTK7.03	Funding Records Capital Grant	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
IRMSTK7.04	Funding Records Earmarked Annual Grant (EAG)	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
IRMSTK7.05	Funding Records General Annual Grant (EAG)	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
IRMSTK7.06	Per pupil funding records	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	
IRMSTK7.07	Funding Records	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	Funding agreement which says that the Academy can receive donations and can only charge where the law allows maintained schools to charge [see Charging and Remission Policy].
IRMSTK7.08	Gift Aid and Tax Relief	Yes	Date of last payment of funding + 6 years		SECURE DISPOSAL	

IRMSTK7.09	Exclusion agreement	No	Date of last payment of funding + 6 years		SECURE DISPOSAL	The Academy can enter into an arrangement with a Local Authority (LA), so that payment will flow between the Academy and the LA, in the same way as it would do were the Academy a maintained school.
IRMSTK7.10	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	
IRMSTK7.11	Management of Endowment Funds	No	Life of fund + 6 years		SECURE DISPOSAL	
IRMSTK7.12	Investment policies	No	Life of the investment + 6 years		SECURE DISPOSAL	
IRMSTK7.13	Pupil Premium Fund records	Yes	Date pupil leaves the provision + 6 years		SECURE DISPOSAL	
IRMSTK7.14	Student Grant applications	Yes	Current year + 3 years		SECURE DISPOSAL	

Operational

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK8.1	Invoices, receipts, order books and requisitions, delivery notices	No	Current financial year + 6 years		SECURE DISPOSAL	

IRMSTK8.2	Records relating to the collection and banking of monies	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK8.3	Records relating to the identification and collection of debt	Yes	Payment or write off of debt + 6 years		SECURE DISPOSAL	

Risk Management and Insurance

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK9.1	Employers Liability Insurance Certificate	No	Year of issue + 40 years. Pass to the Local Authority if the school closes	These Regulations amend the Employers' Liability (Compulsory Insurance) Regulations 1998 (the 1998 Regulations). (cont. in Notes)	SECURE DISPOSAL	Regulation 2(1) omits paragraphs (4) and (5) from regulation 4 of the 1998 Regulations. Paragraph (4) required an employer to retain a copy of its employer liability insurance certificate for 40 years. Paragraph (5) was a consequential provision to paragraph (4), providing for the retention of certificates, and is therefore also being omitted. Paragraph (3) substitutes paragraphs (1) and (2) of regulation 5 of the 1998 Regulations. Under the new provisions, the

						requirements for the display of the certificate will be satisfied if the certificate is made available in electronic form and is reasonably accessible to the relevant employees. Paragraph (4) makes a consequential amendment to regulation 6(b) of the 1998 Regulations.
IRMSTK9.2	Insurance Policies	No	Date the policy expires + 6 years except Public Liability insurance - day of issue + 40 years	As above	SECURE DISPOSAL	As above
IRMSTK9.3	Records relating to the settlement of insurance claims	Yes	Date claim settled + 6 years		SECURE DISPOSAL	
IRMSTK9.4	Burglary, theft and vandalism report forms		Current year + 6 years		SECURE DISPOSAL	
IRMSTK9.5	Audit Committee and appointment of responsible officers	No	As long as necessary		SECURE DISPOSAL	

School fund

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK10.1	School Fund Ledger	Yes [ledger may contain	Current financial year + 6 years		SECURE DISPOSAL	

		names of people in receipt of grants]				
IRMSTK10.2	Whole of government accounts returns	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.3	School Fund Journey books	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.4	School Fund Invoices	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.5	School Fund Receipts	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.6	School Fund Bank statements	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.7	School Fund Cheque books	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK10.8	School Fund Paying in books	No	Current financial year + 6 years		SECURE DISPOSAL	

School Meals

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK11.1	Free school meals registers	Yes	Current financial year + 3 years		SECURE DISPOSAL	
IRMSTK11.2	School meals summary sheets	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK11.3	School meals registers	Yes	Current financial year + 3 years		SECURE DISPOSAL	

Strategic Finance

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK12.01	Annual Accounts	No	Current year + 6 years		SECURE DISPOSAL	
IRMSTK12.02	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	
IRMSTK12.03	Statement of financial activities for the year	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK12.04	Financial Planning	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK12.05	Value for money statement	No	Current financial year + 6 years		SECURE DISPOSAL	
IRMSTK12.06	Borrowing powers	No	Until superseded + 6 years		SECURE DISPOSAL	
IRMSTK12.07	Charging and remissions policy	No	Date policy superseded + 3 years		SECURE DISPOSAL	
IRMSTK12.08	Independent Auditors report on regularity	No	Financial year report relates to + 6 years		SECURE DISPOSAL	
IRMSTK12.09	Independent Auditors report on financial statements	Yes	Financial year report relates to + 6 years			
IRMSTK12.10	Records relating to the management of VAT	No	Current financial year + 6 years		SECURE DISPOSAL	

Governing Bodies

Activities

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK13.1	Records relating to Governor Monitoring Visits	Yes	Date of the visit + 3 years		SECURE DISPOSAL	

Governance

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK14.1	Constitution	No	Date constitution superseded + 10 years. It may be appropriate to retain one copy of each constitution for archival purposes		SECURE DISPOSAL	Companies Act 2006 Section 355: This section refers to Records of Resolutions and meetings etc. it does not mention Constitutions. Resolutions and minutes under this section to be retained for at least 10 years from date of meeting or decision as appropriate (Section 355 (2))
IRMSTK14.2	Articles of Association	No	Life of the Academy		SECURE DISPOSAL	
IRMSTK14.3	Memorandum of Association		This can be disposed of once the Academy has been incorporated		SECURE DISPOSAL	

IRMSTK14.4	Memorandum of Understanding of Shared Governance among Schools		Life of Memorandum of Understanding + 6 years		SECURE DISPOSAL	
IRMSTK14.5	Governance Statement		Life of governance statement + 6 years. One copy of each iteration may need to be retained for archive purposes		SECURE DISPOSAL	
IRMSTK14.6	Written Scheme of Delegation	Yes	Life of Written Scheme of Delegation + 10 years	Companies Act 2006 section 355	SECURE DISPOSAL	
IRMSTK14.7	Special Resolutions to amend the Constitution	No	Date constitution superseded + 10 years. It may be appropriate to retain one copy of each constitution for archival purposes	Companies Act 2006 section 355	SECURE DISPOSAL	Companies Act 2006 section 355 Section 355: This section refers to. Records of Resolutions and meetings etc. it does not mention. Constitutions. Resolutions and minutes under this section to be retained for at least 10 years from date of meeting or decision as appropriate (Section 355 (2))
IRMSTK14.8	Annual Report and Accounts	No	Date of report + 10 years	Companies Act 2006 section 355	SECURE DISPOSAL	
IRMSTK14.9	Annual Report Trustees Report	No	Date of report + 10 years	Companies Act 2006 section 355	SECURE DISPOSAL	
IRMSTK14.11	Annual Return	No	Date of report + 10 years	Companies Act 2006 section 355	SECURE DISPOSAL	
IRMSTK14.12	Instruments of Government	No	For the life of the school		Consult local	

					archives before disposal	
IRMSTK14.13	Register of Directors	Yes	Date Director resigns + 10 years	Companies Act 2006		Companies Act Section121 Removal of entries relating to former members. An entry relating to a former member of the company may be removed from the register after the expiration of ten years from the date on which he ceased to be a member
IRMSTK14.14	Scheme of Delegation and Terms of Reference for Committees	No	Until superseded or whilst relevant		These could be offered to the archives if appropriate	
IRMSTK14.15	Trusts and Endowments managed by the Governing Body	Yes	Life of the Trust or Endowment + 6 years		SECURE DISPOSAL	
IRMSTK14.16	Records relating to complaints dealt with by the Governing Body Annual Report and Accounts	No	Date complaint resolved + 3 years then review. If the complaint relates to negligence or safeguarding then date the complaint resolved + 15 years. If the complaint relates to child		SECURE DISPOSAL	This retention period will be reviewed once the government and the ICO have issued guidance about the implementation of the IICSA recommendations

			sexual abuse then the complaint resolved + 75 years			
IRMSTK14.17	All records relating to the conversion of schools to Academy status	No	For the life of the organisation	Companies Act 2006 section 355	Consult local archives before disposal	
IRMSTK14.18	Policy documents created and administered by the Governing Body	No	Until superseded.		SECURE DISPOSAL	The School should consider keeping all policies relating to safeguarding, child protection or other pupil related issues such as exclusion until the government and ICO have published guidance about the implementation of the recommendations made in the IICSA report

Governors, Directors, and Trustees

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK15.01	Appointment of Trustees and Governors and Directors	Ye	Life of appointment + 6 years	Companies Act 2006 section 355	SECURE DISPOSAL	
IRMSTK15.02	Records relating to the election of parent and staff governors not appointed by the governors	Yes	Date of election + 6 months		SECURE DISPOSAL	
IRMSTK15.03	Records relating to the appointment of co-opted	Yes	Provided that the decision has been recorded in the		SECURE DISPOSAL	

	governors		minutes the records relating to the appointment can be destroyed once the co-opted governor has finished their term of office except where there have been allegations concerning children. In this case retain for 25 years.			
IRMSTK15.04	Records relating to the terms of office of serving governors including evidence of appointment	Yes	Date appointment ceases plus 6 years except where there have been allegations concerning children. In this case retain for 25 years.		SECURE DISPOSAL	
IRMSTK15.05	Records relating to Governor Declaration against disqualification criteria	Yes	Date appointment ceases plus 6 years		SECURE DISPOSAL	
IRMSTK15.06	Governors Code of Conduct	No	This is expected to be a dynamic document, one copy of each version should be kept for the life of the organisation		SECURE DISPOSAL	
IRMSTK15.07	Records relating to DBS checks carried out on clerk and members of the governing body	Yes	Date of DBS check + 6 months		SECURE DISPOSAL	
IRMSTK15.08	Governor personnel files	Yes	Date appointment ceases plus 6 years except where there have been allegations concerning children. In this case retain for 25 years		SECURE DISPOSAL	

IRMSTK15.09	Records relating to the induction programme for new governors	Yes	Date appointment ceases plus 6 years		SECURE DISPOSAL	
IRMSTK15.10	Records relating to the training required and received by Governors	Yes	Date Governor steps down + 6 years		SECURE DISPOSAL	
IRMSTK15.11	Appointment and removal of Members	No	Life of appointment + 6 years		SECURE DISPOSAL	
IRMSTK15.12	Register of members		Date Member resigns + 10 years	Companies Act 2006		
IRMSTK15.13	Statement of Trustees Responsibilities		Life of statement + 6 years			
IRMSTK15.14	Register of Trustees interests	Yes	Date Trustee resigns + 10 years	Companies Act 2006		
IRMSTK15.15	Declaration of Interests Statements	Yes	Date Governor resigns + 10 years		SECURE DISPOSAL	

Meetings

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK16.01	Board Meeting Minute	Yes	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	OFFER TO ARCHIVES	
IRMSTK16.02	Board Decisions	Could be if the decisions refer to living individuals	Date of the meeting + a minimum of 10 years		OFFER TO ARCHIVES	
IRMSTK16.03	Board Meeting: Annual Schedule of Business	No	Current year		SECURE DISPOSAL	

IRMSTK16.04	Board Meeting: Procedures for conduct of meeting	No	Date procedures superseded + 6 years	Limitation Act 1980 (Section 2)	SECURE DISPOSAL	
IRMSTK16.05	Records relating to the management of General Members Meetings	No	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	SECURE DISPOSAL	
IRMSTK16.06	Minutes relating to any committees set up by the Board of Directors	Could be if the decisions refer to living individuals	Date of the meeting + a minimum of 10 years		OFFER TO ARCHIVES	
IRMSTK16.07	Records relating to the management of the Annual General Meeting	Could be if the decisions refer to living individuals	Minutes must be kept for at least 10 years from the date of the meeting	Companies Act 2006 section 248	OFFER TO ARCHIVES	
IRMSTK16.08	Meetings Schedule	No	Current year		STANDARD DISPOSAL	
IRMSTK16.09	Agendas for Governing Body meetings	May be data protection issues if relating to confidential information relating to staff	One copy should be retained with the master set of minutes. All other copies can be disposed of		SECURE DISPOSAL	
IRMSTK16.10	Agendas Additional Copies	No	Date of Meeting		STANDARD DISPOSAL	
IRMSTK16.11	Minutes of, and papers considered at, meetings of the Governing Body and its committees – Principal Set and Inspection Copies	May be data protection issues if relating to confidential	Date of meeting + 10 years		SECURE DISPOSAL	

		information relating to staff				
IRMSTK16.12	Minutes of, and papers considered at, meetings of the Governing Body and its committees –Inspection Copies	May be data protection issues if relating to confidential information relating to staff	Date of meeting + 10 years		SECURE DISPOSAL	
IRMSTK16.13	Reports presented to the Governing Body	Yes	Date of meeting the report was presented to + 10 years		SECURE DISPOSAL or retain with the signed set of minute	
IRMSTK16.14	Reports made to the Governors Meeting which are referred to in the minutes	Potential	Life of organisation	Companies Act 2006	Consult local archives before disposal	
IRMSTK16.15	Register of attendance at Full Governing Board meetings	Yes	Date of last meeting in the book + 6 years		SECURE DISPOSAL	
IRMSTK16.16	Papers relating to the management of the Annual Parents Meeting	Yes	Date of meeting + 6 years		SECURE DISPOSAL	

Health and Safety

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes

IRMSTK17.01	Health and Safety policy statements	No	Life of policy + 3 years		SECURE DISPOSAL	
IRMSTK17.02	Health and safety file to show current state of building including all alterations	No	Pass to new owner on sale or transfer of building		SECURE DISPOSAL	(includes wiring, plumbing, building works etc) and to be passed on in the case of change of ownership)
IRMSTK17.03	Fire precautions log books	No	Current year + 6 years		SECURE DISPOSAL	
IRMSTK17.04	Fire risk assessments	No unless containing Personal Emergency Evacuation plans	Life of the risk assessment + 3 years	Fire Service Order 2005	SECURE DISPOSAL	
IRMSTK17.05	Accident reporting: Adults	Yes	Date of last entry in the accident book + 3 years but if there is possibility of negligence allegation then date of incident + 15 years or date of settlement + 6 years	Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980	SECURE DISPOSAL	Do not keep completed entries in the book. They must be removed and kept in a locked location.
IRMSTK17.06	Records relating to accident/injury at work including incident reports	Yes	Date of incident plus 6 years unless the injury is serious - broken limb, more than 3 days in hospital etc then date of incident plus 15 years (Negligence)		SECURE DISPOSAL	
IRMSTK17.07	Accident reporting: Children	Yes	The official Accident Book must be retained for 3 years	Social Security (Claims and Payments)	SECURE DISPOSAL	Do not keep completed entries in the book. They

			after the last entry in the book.	Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980		must be removed and kept in a locked location.
IRMSTK17.08	Control of Substances Hazardous to Health (COSHH)	No	COSHH sheets should be kept whilst the substance is in use + 6 years COSHH policy documents should be kept until the policy is superseded + 6 years		SECURE DISPOSAL	
IRMSTK17.09	Records relating to any reportable death, injury, disease or dangerous occurrence (RIDDOR)	Yes	Date of incident + 3 years provided that all records relating to the incident are held on personnel file.	Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 2013 SI 2013 No 1471 Regulation 12(2)	SECURE DISPOSAL	
IRMSTK17.10	Health and Safety risk assessments	No	Life of risk assessment + 3 years		SECURE DISPOSAL	
IRMSTK17.11	Process of monitoring of areas where employees and persons have or are likely to have come into contact with asbestos	Yes	Last action + 40 years	Control of Asbestos at Work Regulations 2012 SI 1012 No 632 Regulation 19	SECURE DISPOSAL	
IRMSTK17.12	Process of monitoring of areas where employees and persons are likely to have come into contact with radiation: Dose assessment and recording	No	2 years from the date on which the examination was made and that the record includes the condition of the equipment at the time of the examination. To keep the records made and maintained	The Ionising Radiations Regulation 2017	SECURE DISPOSAL	

			or a copy of these records until the person to whom the record relates has or would have attained the age of 75 years but in any event for at least 30 years from when the record was made			

Liaison with LEA-DFE

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK18.1	OFSTED reports and papers	No	Life of the report then REVIEW		SECURE DISPOSAL	
IRMSTK18.2	Returns made to central government	No	Current year + 6 years		SECURE DISPOSAL	
IRMSTK18.3	School census returns	No	Current year + 5 years		SECURE DISPOSAL	
IRMSTK18.4	Circulars and other information sent from the Local Authority		Operational use		SECURE DISPOSAL	
IRMSTK18.5	Circulars and other information sent from central government	No	Operational use		SECURE DISPOSAL	
IRMSTK18.6	Attendance returns	Yes	Academic year + 1 year		SECURE DISPOSAL	

Parent Teacher Association

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes

IRMSTK19.1	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Yes	Current year + 6 years then REVIEW		Transfer to new owner	

Property

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK20.1	Title deeds of properties belonging to the school	No	These should follow the property, unless the property has been registered with the Land Registry		Transfer to new owner	
IRMSTK20.2	Plans of property belonging to the school, including any alterations. This is also a health and safety requirement and includes rewiring diagrams and additional fire safety features	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		Pass to next owner	
IRMSTK20.3	Leases of property leased by or to the school	No	Expiry of lease + 6 years		SECURE DISPOSAL	
IRMSTK20.4	Business continuity and disaster recovery plans	Yes	These are dynamic documents which should be kept up to date		SECURE DISPOSAL OF OLD PLANS	
IRMSTK20.5	Records relating to the letting of school premises	No	Current financial year + 6 years		SECURE DISPOSAL	

Pupils and students

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK21.3	Attendance registers	Yes	Every entry in the attendance register must be preserved for a period of three years after the date on which the entry was made.	School attendance Guidance for maintained schools, academies, independent schools and local authorities	SECURE DISPOSAL	
IRMSTK21.4	Correspondence relating to any absence (authorised or unauthorised)	Potentially	Current academic year + 2 years	Education Act 1996 Section 7	SECURE DISPOSAL	

School Admissions

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK22.1	All records relating to the creation and implementation of the School Admissions Policy	No	Life of the policy + 7 years. 15(2) of the regulation refers to the 7 preceding years	School Admissions Code Statutory guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
IRMSTK22.2	Register of admissions	Yes	Every entry in the admission register must be preserved for a period of 3 years after the date on which the entry was	School attendance Guidance for maintained schools, academies,	Schools may wish to consider keeping the	

			made.	independent schools and local authorities	admission register permanently, as often schools receive enquiries from past pupils to confirm the dates they attended the school	
IRMSTK22.3	Admissions if the appeal is unsuccessful	Yes	Resolution of case + 1 year	School Admissions Code Statutory Guidance for admission authorities, governing bodies, local authorities, schools adjudicators and admission appeals panels	SECURE DISPOSAL	
IRMSTK22.4	Admissions if the appeal is successful	Yes	Date of admission + 1 year	Same as above	SECURE DISPOSAL	
IRMSTK22.5	Admissions Secondary Schools Casual	Yes	Current academic year + 1 year		SECURE DISPOSAL	
IRMSTK22.6	Proofs of address supplied by parents as part of the admissions process	Yes	Current academic year + 1 year	Same as above		
IRMSTK22.7	Supplementary information	Yes	This information should be		As per pupil	

	form, including additional information such as religion and medical conditions: For successful admissions		added to the pupil file		file	
IRMSTK22.8	Supplementary information form, including additional information such as religion and medical conditions: For unsuccessful admissions	Yes	Until appeals process completed		SECURE DISPOSAL	
IRMSTK22.9	Records relating to the management of exclusions	Yes	Date of birth of the pupil involved + 25 years		SECURE DISPOSAL	

School Assets

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK23.1	Community School leases for land	No	Date lease expires + 6 years		SECURE DISPOSAL	
IRMSTK23.2	Commercial transfer arrangements	No	Date of transfer + 6 years		SECURE DISPOSAL	
IRMSTK23.3	Transfer of land to the Academy Trust	No	Life of land ownership then transfer to new owner		SECURE DISPOSAL	
IRMSTK23.4	Transfers of freehold land	No	Life of land ownership then transfer to new owner		SECURE DISPOSAL	
IRMSTK23.5	Records relating to the leasing of shared facilities, such as sports centres	No	End of lease + 6 years		SECURE DISPOSAL	
IRMSTK23.6	Land and building valuations	No	Date valuation superseded + 6 years		SECURE DISPOSAL	

IRMSTK23.7	Disposal of assets	No	Date asset disposed of + 6 years		SECURE DISPOSAL	
IRMSTK23.8	Burglary, theft and vandalism report forms	No	Date of insurance settlement + 6 years		SECURE DISPOSAL	
IRMSTK23.9	Inventories of furniture and equipment		Life of equipment + 6 years		SECURE DISPOSAL	

School Management

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK24.01	Log books of activity in the school maintained by the Head Teacher	Potentially	Date of last entry in the book + a minimum of 6 years then REVIEW		SECURE DISPOSAL	There may be data protection issues if the log book refers to individuals
IRMSTK24.02	Visitor Management Systems (including electronic systems, visitors books and signing in sheets)	Yes	Academic Year + 1 year		SECURE DISPOSAL	
IRMSTK24.03	School Privacy Notice which is sent to parents as part of GDPR compliance	No	Life of the privacy notice/until the privacy notice expires plus 6 years		SECURE DISPOSAL	
IRMSTK24.04	Consents relating to school activities as part of GDPR compliance	Yes	Consents should be retained for as long as the consent is relied on.		SECURE DISPOSAL	
IRMSTK24.05	Records relating to the creation and distribution of circulars to staff, parents or pupils	No	Current year + 1 year		STANDARD DISPOSAL	
IRMSTK24.06	Minutes of Senior Management Team meetings and meetings of	Potentially	Date asset disposed of + 6 years		SECURE DISPOSAL	There may be data protection issues if

	other internal administrative bodies					minutes refers to individuals
IRMSTK24.07	Reports created by the Head Teacher or the Management Team	Potentially	Date of the meeting + 3 years then REVIEW		SECURE DISPOSAL	There may be data protection issues if records refers to individuals
IRMSTK24.08 IRMSTK24.09	Records and correspondence created by Head Teachers, Deputy Head Teachers, heads of year and other members of staff with administrative responsibilities	Potentially	Date of document + 3 years then REVIEW		SECURE DISPOSAL	There may be data protection issues if records refers to individuals
IRMSTK24.10	Management of complaints	Yes	Date complaint resolved + 3 years then review. If the complaint relates to negligence or safeguarding then date the complaint resolved + 15 years. If the complaint relates to child sexual abuse then the complaint resolved + 75 years		SECURE DISPOSAL	This retention period will be reviewed once the government and the ICO have issued guidance about the implementation of the IICSA recommendations
IRMSTK24.11	Newsletters and other items with a short operational use	No	Current year + 1 year		SECURE DISPOSAL	
IRMSTK24.12	Records relating to the creation and publication of the school brochure or prospectus	No	Current year + 3 years		STANDARD DISPOSAL	

Special Education Needs and Disabilities

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK25.1	Special Educational Needs files, reviews and Individual Education Plans	Yes	Date of birth of the pupil + 25 years	Limitation Act 1980	SECURE DISPOSAL	There may be data protection issues if the log book refers to individuals
IRMSTK25.2	Statement maintained under section 234 of the Education Act 1990 and any amendments made to the statement	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then 6 years after legal action ended	Education Act 1996 Special Educational Needs and Disability Act 2001 Section 1	SECURE DISPOSAL	IICSA recommendations awaited
IRMSTK25.3	Advice and information provided to parents regarding educational needs	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years	Special Educational Needs and Disability Act 2001 Section 2	SECURE DISPOSAL	This retention period will be reviewed once the government and the Information Commissioner have published guidance about implementing the recommendations made by IICSA.
IRMSTK25.4	Accessibility strategy	Yes	Date of birth of the pupil + 25 years [This would normally be retained on the pupil file] unless the document is subject to a legal hold then date legal action ceases + 6 years		SECURE DISPOSAL	

Teachers and Staff

Disciplinary

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK26.1	Disciplinary Proceedings: Oral warning	Yes	Date of warning + 6 months		SECURE DISPOSAL	Where related to a child protection matter, contact Safeguarding Child Officer for advice.
IRMSTK26.2	Disciplinary Proceedings: Written warning level 1	Yes	Date of warning + 6 months		SECURE DISPOSAL	Where related to a child protection matter, contact Safeguarding Child Officer for advice.
IRMSTK26.3	Disciplinary Proceedings: Written warning level 2	Yes	Date of warning + 12 months		SECURE DISPOSAL	Where related to a child protection matter, contact Safeguarding Child Officer for advice.
IRMSTK26.4	Disciplinary Proceedings: Final warning	Yes	Date of warning + 18 months		SECURE DISPOSAL	Where related to a child protection matter, contact Safeguarding Child Officer for advice.
IRMSTK26.5	Disciplinary Proceedings: Case not found	Yes	Dispose of at the conclusion of the case		SECURE DISPOSAL	If the incident is child protection related, then see Safeguarding.

Pay and Pensions

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK27.01	Records relating to the agreement of pay and	No	Date pay and conditions superseded + 6 years		SECURE DISPOSAL	

	conditions					
IRMSTK27.02	Payroll records	Yes	Date payroll run + 6 years		SECURE DISPOSAL	
IRMSTK27.03	Payroll reports	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.04	Payroll awards	Yes	Current year + 6 years		SECURE DISPOSAL	
IRMSTK27.05	Payroll gross / net weekly or monthly	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.06	Payslips copies	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.07	Pay packet receipt by employee	Yes	Current year + 2 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.08	Maternity pay records	Yes	Current year + 3 years	Statutory Maternity Pay (General) Regulations 1986, revised 1999	SECURE DISPOSAL	
IRMSTK27.09	Part time fee claims	Yes	Current year + 6 years	Statutory Maternity Pay (General) Regulations 1986, revised 1999	SECURE DISPOSAL	
IRMSTK27.10	Overtime	Yes	Current year + 3 years		SECURE DISPOSAL	
IRMSTK27.11	National Insurance Schedule of payments	Yes	Current year + 6 years		SECURE DISPOSAL	

IRMSTK27.12	Insurance	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.13	Car allowance claims	Yes	Current year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.14	Car mileage output	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.15	Car loans	Yes	Completion of loan + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.16 IRMSTK27.17	Time sheets /clock cards / flexitime and bonus sheets	Yes	Current year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.18	Staff returns	Yes	Current year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.19	Sickness records	Yes	Current year + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.20	Tax forms P6 /P11 / P11D / P35 / P45/ P46 / P48	Yes	Current year + 6 years		SECURE DISPOSAL	
IRMSTK27.21	Personal bank details	Yes	Until superseded + 3 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.22	Income tax form P60	Yes	Current year + 6 years.	Taxes Management Act 1970; Income and	SECURE DISPOSAL	

				Corporation Taxes 1988		
IRMSTK27.23	Pension payroll	Yes	Current year + 6 years.	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.24	Superannuation adjustments	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.25	Superannuation reports	Yes	Completion of loan + 6 years		SECURE DISPOSAL	
IRMSTK27.26	Members Allowance register	Yes	Current year + 6 years	Taxes Management Act 1970; Income and Corporation Taxes 1988	SECURE DISPOSAL	
IRMSTK27.27	Records relating to pension registrations	Yes	Date of last payment on the pension + 6 years		SECURE DISPOSAL	
IRMSTK27.28	Management of the Teachers Pension Scheme	Yes	Date of last payment on the pension + 6 years		SECURE DISPOSAL	
IRMSTK27.29	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes	From the end of the year in which the accounts were signed for a minimum of 6 years	Retirement Benefits Schemes (Information Powers) Regulations 1995 (SI 1995/3103) Regulation 15	SECURE DISPOSAL	

Recruitment

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK28.1	All records leading up to the appointment of a new Head Teacher	Yes	Length of appointment + 6 years		SECURE DISPOSAL	
IRMSTK28.2	All records leading up to the	Yes	Relevant information		SECURE	

	appointment of a new member of staff successful candidate		should be added to the staff personnel file		DISPOSAL	
IRMSTK28.3	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	
IRMSTK28.4	Pre-employment vetting information DBS Checks: includes date of issue, name of subject, type of disclosure, position for which disclosure was requested, unique reference number	Yes	Retained in personnel file	DBS Update Service Employer Guide June 2014; Keeping Children Safe in Education, (Statutory Guidance from Dept. of Education) Sections 73, 74	SECURE DISPOSAL	Schools will not keep a copy of the DBS,. See IRMS for more information
IRMSTK28.5	Proofs of identity collected as part of the process of checking portable enhanced DBS disclosure	Yes	Where possible the school will not retain a copy and will only keep a record of the proof of identity being seen. If kept, it will be retained in the personnel file		SECURE DISPOSAL	
IRMSTK28.6	Pre-employment vetting information. Evidence proving the right to work in the United Kingdom	Yes	Retained in personnel file	An employers guide to right to work checks [Home Office May 2015]	SECURE DISPOSAL	Employers are required to take a clear copy of the documents which they are shown as part of this process
IRMSTK28.7	Records relating to the employment of overseas teachers	Yes	Retained in personnel file		SECURE DISPOSAL	

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK29.1	Allegation which is child protection in nature against a member of staff, including where the allegation is unfounded	Yes	Until the persons normal retirement age or 10 years from the date of the allegation, whichever is longer, then REVIEW	Keeping Children Safe in Education, Working together to safeguard children	SECURE DISPOSAL	The retention period will be reviewed once the guidance by the government and ICO about implementing the recommendations made by IICSA has been published.

Staff Management

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK30.01	Staff Personal File, including employment contract and staff training records	Yes	Termination of employment + 6 years	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK30.02	Timesheets	Yes	Current year + 3 years		SECURE DISPOSAL	
IRMSTK30.03	Absence record	Yes	Current year + 3 years		SECURE DISPOSAL	
IRMSTK30.04	Sickness Absence Monitoring	Yes	Current year + 3 years, if sickness pay is made then current year + 6 years		SECURE DISPOSAL	
IRMSTK30.05	Annual appraisal/assessment records	Yes	Current year + 3 years		SECURE DISPOSAL	
IRMSTK30.06	Records relating to the TUPE process	Yes	Date last member of staff transfers or leaves the organisation + 6 years		SECURE DISPOSAL	

IRMSTK30.07	Training needs analysis	No	Current year + 1 year		SECURE DISPOSAL	
IRMSTK30.08	Staff Training where the training leads to Continuing Professional Development	Yes	Length of time required by the professional body			
IRMSTK30.09	Staff Training except where dealing with children, e.g. First Aid or Health and Safety	Yes	This should be retained on the personnel file			
IRMSTK30.10	Staff Training where the training relates to children (e.g. safeguarding or other child related training)	Yes	Date of the training + 40 years		SECURE DISPOSAL	This retention period will be reviewed when the government and ICO have published guidance about how to implement the recommendations made by IICSA.
IRMSTK30.11	Professional Development Plans	Yes	Life of the plan or plan superseded + 6 years		SECURE DISPOSAL	

Teaching and the Curriculum

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK31.01	Schemes of Work	No	Current year + 1 year		SECURE DISPOSAL	It may be appropriate to review these records at the end of each year and allocate a further retention period
IRMSTK31.02	Timetable	No	Academic year + 1 year		SECURE DISPOSAL	Same as above

IRMSTK31.03	Class record books	No	Academic year + 1 year		SECURE DISPOSAL	Same as above
IRMSTK31.04	Mark books	No	Academic year + 1 year		SECURE DISPOSAL	Same as above
IRMSTK31.05	Record of homework set	No	Academic year + 1 year		SECURE DISPOSAL	Same as above
IRMSTK31.06	Pupils work	Yes	Where possible, work should be returned to the pupil at the end of the academic year, or current year +1		SECURE DISPOSAL	Same as above

Transport (Educational)

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK32.01	The process of acquisition and disposal of vehicles through lease or purchase, e.g., contracts/leases, quotes, approvals	No	Disposal of the vehicle + 6 years	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK32.02	The process of managing allocation and maintenance of vehicles, e.g., lists of who was driving the vehicles and when, and maintenance	No	Disposal of the vehicle + 6 years	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK32.03	Service logs and vehicle logs	No	Life of the vehicle, then either to be retained for 6 years by school or to be returned to lease company	Limitation Act 1980	SECURE DISPOSAL	

IRMSTK32.04	GPS tracking data relating to the vehicles	No	Current year + 12 months	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK32.05	Tachograph: Analogue and electronic including driver's cards	No	Current year + 12 months	Transport Act 1968 Chapter 73 Sections 96, 98, 99, 103. Passenger and Goods Vehicles (Recording Equipment) Regulations 2005 SI 2005 No 1904. Passenger and goods Vehicles (Recording Equipment) (downloading and Retention of Data) Regulations 2008 SI 2008 No 198. EC Regulation 561/2006 EC or AETR rules may also apply includes digital recording equipment	SECURE DISPOSAL	
IRMSTK32.06	Driver's records book	Yes	12 months from date of return of book to employer or in the case of owner driver 12 months from date of completion of book or it ceased to be used Driver to retain book for 14 days after all weekly record sheets have been used.	Transport Act 1968 Chapter 73 Sections 96, 98, 99, 103. Drivers' Hours (Goods Vehicles) (Keeping of Records) Regulations 1987. SI 1987 No.1421. Regulation 11 Preservation of driver's record books.	SECURE DISPOSAL	
IRMSTK32.07	Walking bus registers	Yes	Date of register + 3 years		SECURE DISPOSAL	This takes into account the fact that, if there is an incident requiring an

						accident report, the register will be submitted with the accident report and kept for the period of time required for accident reporting

Welfare

Ref	Retention Period Description	Personal Information	Retention Period	Statutory Provisions	Disposal	Notes
IRMSTK33.01	Family Liaison Officers and Home School Liaison Assistants: Day Books	Yes	Current year + 2 years then review		SECURE DISPOSAL	
IRMSTK33.02	Family Liaison Officers and Home School Liaison Assistants: Reports for outside agencies - where the report has been included on the case file created by the outside agency	Yes	Whilst child is attending school and then destroy		SECURE DISPOSAL	
IRMSTK33.03	Family Liaison Officers and Home School Liaison Assistants: Referral forms	Yes	While the referral is current		SECURE DISPOSAL	
IRMSTK33.04 IRMSTK33.05	Family Liaison Officers and Home School Liaison Assistants: Contact data sheets and contact database entries	Yes	Current year then review, if contact is no longer active then destroy		SECURE DISPOSAL	

IRMSTK33.06	Family Liaison Officers and Home School Liaison Assistants: Group Registers	Yes	Current year + 2 years		SECURE DISPOSAL	
IRMSTK33.07	Accessibility Plan relating to individual pupils	Yes	The plan should be included on the pupil file	Limitation Act 1980	SECURE DISPOSAL	
IRMSTK33.08	Child protection information held on pupil file	Yes	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	Keeping Children Safe in Education, Working together to safeguard children	SECURE DISPOSAL	
IRMSTK33.09	Child protection information held in separate files	Yes	Date of birth of the child + 25 years then REVIEW	Keeping Children Safe in Education, Working together to safeguard children	SECURE DISPOSAL and shredded	
IRMSTK33.10	Correspondence relating to authorised absence	Yes	Current academic year + 2 years	Education Act 1996 Section 7	SECURE DISPOSAL	