Information Governance
Support Services
by Stockport Council



Schools Records Retention Schedule 2026/27

Contents

Contents 2
Records Retention 4
Keeping Emails 5
Pupil Files 6
Transferring Records 6
School Management Information Systems (MIS) 7
Disposal 8
The Independent Inquiry into Child Sexual Abuse 9
Review and amendments 9
Further Guidance and information 9
1. Governing Body 10
2. Governor Management 12
3. Senior Management Team 14
4. Staff Management 17
5. Financial Management 32
6. Operational Administration 35
7. Pupil Management 48
8. Curriculum and Extra Curriculum Activities 66
9. Central Government & Local Authority 73

Introduction

Under the UK GDPR and Data Protection Act 2018, schools must not retain personal data for longer than is necessary and must be able to demonstrate compliance with the data protection principles.

A documented retention schedule supports those obligations. It also supports effective records management and assists schools in responding to requests made under the Freedom of Information Act 2000 and Environmental Information Regulations 2004.

Applying the retention schedule supports compliance with the storage limitation, data minimisation and accountability principles. The lawful basis for processing must be identified separately within the school's privacy information and Record of Processing Activities.

Members of staff are expected to manage their current record keeping systems using the retention schedule and to take account of the different kinds of retention periods when they are creating new record keeping systems. This retention schedule applies to all records regardless of format (i.e. paper, electronic, photographic) on/in which it is stored.

Schools create and receive large volumes of information in the course of delivering educational, safeguarding, governance, financial and administrative functions. These records are a valuable asset which support the effective management of the school, enable accountability and transparency, and provide evidence of decisions, actions and statutory responsibilities.

Under the UK General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, schools must ensure that personal information is processed lawfully, fairly and transparently and is not retained for longer than is necessary for the purpose for which it was collected. Schools must also be able to demonstrate compliance with the data protection principles, including storage limitation and accountability. A documented records retention schedule helps schools meet these obligations.

The Freedom of Information Act 2000 (FOIA) and Environmental Information Regulations 2004 (EIR) require schools to manage information effectively and make requested information available where disclosure is required by law. Effective records management supports compliance with these requirements by ensuring that information can be located, retrieved and disposed of appropriately.

This Records Retention Schedule sets out the minimum periods for which records should normally be retained and the action to be taken when those records are no longer required. The schedule applies to all records regardless of format, including paper records, electronic documents, emails, photographs, audio recordings, video recordings and information held within business systems and cloud services.

Retention periods within this schedule represent the minimum period that records should normally be retained. Records may be retained for longer where there is a documented business need, statutory requirement, safeguarding reason, historical significance, legal hold, ongoing investigation, litigation, complaint, public inquiry, audit or information access request. Where records are retained beyond the scheduled retention period, the reason for continued retention should be documented and a new review date assigned.

The schedule should be used alongside the school's information governance, data protection, safeguarding, information security and records management policies. Retention periods do not in themselves determine the lawful basis for processing personal data. Schools must ensure that an appropriate lawful basis under Article 6 UK GDPR, and where applicable an additional condition under Article 9 or Article 10 UK GDPR, has been identified for the processing activity.

Benefits

Applying this Records Retention Schedule will help schools to:

- ensure records are retained only for as long as necessary to meet legal, regulatory, operational and safeguarding requirements;
- support compliance with the UK GDPR, Data Protection Act 2018, Freedom of Information Act 2000 and Environmental Information Regulations 2004;
- improve efficiency in locating, retrieving and managing information;
- reduce storage, administration and information security risks associated with retaining information longer than necessary;
- support the secure and auditable disposal of records; and
- ensure that records required for safeguarding, legal proceedings, investigations, public inquiries or historical purposes are protected and preserved appropriately.

Records Retention

The records and retention schedule provides details of the type of records that schools hold, their recommended minimum retention period and where applicable the supporting justification, such as statutory and legislative obligations, guidance, and industry best practice to provide assistance on the recommended length of time to retain records for.

Once a record has reached the end of its retention period it should be reviewed, and a decision made if it needs to be retained for longer before destruction. If the decision is made that records should be kept for a longer period, then this decision must be documented, and a new review date assigned.

Where there is justification, records may be retained locally longer than the minimum period set within this schedule. Divergence from the retention and disposal schedule GDPR or FOIA, pending or actual legal action, investigation, or inquiry, change of legislation or regulations, or to support a legitimate business need.

School’s records are an important public asset and represent a key resource to the effective operation, decision-making and accountability of the school. Every school has a duty to manage its records in accordance with business needs and regulatory requirements.

The retention schedule is used to:

- ensure that schools only hold records for as long as they are needed and enable them to meet their legislative and statutory obligations or to protect legal and other rights and interests.
- to demonstrate that the disposal of information and records has been carried out according to an agreed policy and under proper authority.
- ensure destruction so that office and server space are not used, and costs are not incurred in maintaining records that are no longer required and for records containing personal information it also ensures compliance with Article 5(1)(e) of the UK GDPR Storage Limitation principle.

Ensuring that your school erases or anonymises personal data when it is no longer needed will reduce the risk that it becomes irrelevant, excessive, inaccurate, or out of date. Apart from helping the school to comply with the data minimisation and accuracy principles under the UK GDPR, this also reduces the risk that council will use such data in error.

Retention periods in this Schedule are defined as the 'Minimum' this means that records may be retained for a longer period should they be required but must not be disposed of before their identified time.

Retention periods should be calculated from the end of the year after the last date on the record. For example, a record dated September 2023 for which the retention period is 6 years the record should be kept in its entirety at least until the beginning of 2030.

Keeping Emails

Emails are an important part of the school's corporate record they are also subject to the UK GDPR, the Data Protection Act and the Freedom of Information Act. Therefore, they need to be managed in a way that meets legislative requirements.

In practice only a small percentage of emails will contain information of value or importance to the school so by keeping all emails this can result in a significant storage burden, create inefficiency and increase the risk of non-compliance with the legislation above. Email volumes can also become unmanageable, leading to real problems. For example;

- there is a risk of a breach of the UK GDPR if emails contain personal or sensitive information and are retained long term in mailboxes
- emails may pose more of a security risk if retained indefinitely,
- they can be difficult to search and find information
- storage capacity can become limited and costly.

Emails of corporate value and those that need to be kept for accountability purposes or to comply with regulatory requirements or protect legal and other rights and interests should be stored in the school's record management system such as Google Drive or Microsoft SharePoint or other Electronic Document and Records Management System (EDRMS) solution as applicable.

Personal and Shared email inboxes should not be used for storing information as it can become siloed. By identifying which emails are of value and locating them with other

relevant information, you can be more confident that they are accessible to those that need them and retained only as long as they are required. For email retention you need to consider when making a decision to delete or not to delete;

- Emails of corporate value and enduring public interest should be retained.
- Use the retention schedule to decide how long to retain emails and attachments and apply retention that is relevant to the subject they relate to.

Auto-deletion can be a useful tool in managing email volumes. It can reduce the need for manual processes which can often fail due to lack of time, resource and priority. An auto-deletion policy can also encourage users to actively consider which emails have ongoing value and therefore need to be captured in the Schools EDRMS solution.

Pupil Files

Generally, primary schools need to only retain pupil records while the pupil remains at the school, if a pupil transfers to another establishment once the pupil has moved to secondary school, then the record should follow with them. Secondary schools then keep the records for 25 years after the pupil's date of birth. For the majority of records this will be the pupil record information as given in Schedule 2 of the Education (Pupil Information) (England) Regulations 2005.

Records transfer is usually done through the Common transfer file (CTF) and the pupil record should not be weeded before transfer to the secondary school. Headteachers must ensure the statutory requirements for the transfer of records between schools are fulfilled, including the completion of the common transfer file (CTF). This is noted in the Pupil Information Regulations.

Transferring Records

The Pupil Information Regulations provide a statutory requirement for schools to keep a curricular record for each pupil, disclose a pupil's educational record to his parent upon request, and to transfer a pupil's common transfer file and educational record when the pupil changes school. Headteachers must ensure the statutory requirements for the transfer of records between schools are fulfilled, including the completion of the common transfer file (CTF). This is noted in the Pupil Information Regulations.

All information incorporated within a pupil's educational record constitutes personal data under the UK GDPR and DPA. It is therefore subject to disclosure following a written 'subject access' request by the pupil or a parent on their behalf. Under the Pupil Information Regulations, a school's governing body must ensure that a pupil's educational record is made available for parents to see within 15 school days of receipt of the parent's written request.

Once a transfer has been requested by the student's new establishment and authorised by their previous establishment, the relevant pupil records should be sent across to the new establishment. In many cases this simply means that the previous school relinquish access, and those access rights are transferred to the new school and the data is kept intact. You

may need to retain some records where there is ongoing legal action or a complaint until the case is closed but records should not be necessarily retained ‘just in case’.

For records relating to child, protection and safeguarding if data relating to these is held on your Management Information System (MIS) and you hold on to a copy and the child is no longer at your school, you will need to have a lawful basis to hold that information as you are no longer involved as an establishment in supporting the child. You may choose to have a period of delay in the destruction or deletion of any copy of the record to ensure that the file has been received and that the file has been received by the next school and that the child has started in the new establishment, but this should be a minimal timeframe to ensure you comply with the ‘as long as necessary’ definition under the UK GDPR.

School Management Information Systems (MIS)

Choosing the right Management Information System (MIS) has the potential to make a huge difference to the effective running of a school, and to the workload of the staff who need to use it. However, the records that are retained within these systems need to be managed as you would with any other records and kept confidential, held securely and compliance with the UK GDPR and DPA 18.

In school MIS systems (such as SIMs and CPOMS), there is a need to manage data retention through a combination of automated processes and manual oversight. Each system has its own set of rules and guidelines that ensure compliance with data protection legislation.

1. Use this data retention schedule to establish clear data retention policies that specify how long different types of data should be kept.
2. Utilise automated features within these systems to manage data retention. Schools should assess and configure the retention and deletion functions available in their MIS and safeguarding systems.
3. Regular audits and reviews are essential. Perform routine checks to ensure compliance with retention policies. Provide training for staff to understand the importance of data retention and how to manage it effectively within these systems.
4. Ensure that data is securely disposed of when it is no longer needed. This involves securely deleting electronic records and shredding physical documents. By following these practices, schools can maintain a high standard of data protection and ensure that its MIS systems are used efficiently and securely.
5. Where records are linked on MIS systems careful consideration should be taken where deletion is applied which may delete other records with longer retention requirements. These records may require pseudonymisation or anonymisation.

Disposal

Records scheduled for disposal and destruction should be destroyed in as secure a manner as required by the level of confidentiality or security they bear.

For example, records containing personal information about living individuals should be destroyed in a way that prevents unauthorised access. With digital records, it may be necessary to do more than overwrite the data to ensure the information is destroyed.

When destruction is carried out by an external contractor, the contract should stipulate that the security and access arrangements established for the records will continue to be applied until destruction has taken place. In some cases, there will be more than one copy of record.

Records should be securely deleted or destroyed from live systems when they reach the end of their retention period, subject to any legal hold, investigation, litigation, information access request or business requirement for continued retention. Where records exist within managed backup or disaster recovery systems, copies may remain within protected backups until those backups expire in accordance with the organisation's documented backup retention and recovery processes.

Backup copies must not be restored into normal business use except where required for authorised recovery, business continuity, disaster recovery, legal, regulatory or investigative purposes. Following expiry of the backup retention period, any remaining copies will be removed as part of the normal backup lifecycle..

Records should not be kept after they have ceased to be of use to the School unless:

a) They are known to be the subject of litigation or a request for information or required by a Court, Tribunal or an Inquiry. If so, destruction should be delayed until the litigation is complete or, in the case of a request for information, all relevant complaint and appeal provisions have been exhausted,
b) They have long-term value for historical or other research. (Note that records containing personal information that has been fully anonymised can be kept indefinitely for historical research purposes.

Documentation on destroyed records should be kept indefinitely to manage the risk of not having evidence that records were destroyed during a managed disposal process, in the event that destruction of particular records is questioned.

Documentation should provide evidence that the destruction took place in accordance with established and formally adopted policies and schedules and with appropriate authorisation. Without this it may be difficult to demonstrate that records were not eliminated to avoid disclosing them in response to a request for information.

The Independent Inquiry into Child Sexual Abuse

The Independent Inquiry into Child Sexual Abuse published its final report on 20 October 2022. It recommended a consistent approach to retaining records concerning allegations or cases of child sexual abuse, with a proposed retention period of 75 years and appropriate review arrangements.

Schools must ensure that records are not destroyed where they are subject to an active legal hold, litigation, an information request, an investigation or a public inquiry. Records known to relate to allegations or cases of child sexual abuse should be retained for 75 years in accordance with this schedule and reviewed before any disposal. This is a local retention requirement intended to protect the rights and interests of victims and survivors and should not be described as a continuing IICSA moratorium.

Review and amendments.

When appropriate the retention schedule will be reviewed and amended by the Information Governance Support Team to include any new record series created and remove any obsolete record series.

Further Guidance and information

For further information about this records management and retention or information governance please contact: igschoolsupport@stockport.gov.uk.

Information Governance
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1. Governing Body

1.1 Management of Governing Body

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.1.1.0	Action plans created and administered by the Governing Body	Life of the action plan plus 3 years	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools	Potential	Secure disposal
SRS.1.1.2	Agendas - Principal Set	Where possible agendas should be kept with principal set of minutes	Retain in school. Offer to County Record Office when school closes	Potential	Secure disposal
SRS.1.1.3	Annual Reports sent to Department for Education (Mandatory for Academy Schools)	Date of Report plus 10 years	Education (Governor's Annual Reports) (England) (Amendment) Regulations 2002	Potential	Secure disposal
SRS.1.1.4	Inspection Copies	Date of meeting plus 3 years	If these minutes contain any sensitive, personal information they must be shredded.	Potential	Secure disposal
SRS.1.1.5	Instruments of Government including Articles of Association	For the life of the school	Retain in school. Offer to County Record Office when school closes		
SRS.1.1.6	Meeting papers relating to the annual parents' meeting.	Date of the meeting plus a minimum of 6 years		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.1.1.7	Minutes - Principal Set (signed)	For the life of the school (although legally only to have been made available for 10 years)	Retain in school. Offer to County Record Office when school closes	Potential	
SRS.1.1.8	Policy documents	Expiry of policy	Retain in school whilst policy operational (this includes if the expired policy is part of a past decision-making process).	No	
SRS.1.1.9	Policy documents created and administered by the Governing Body	Life of the action plan plus 3 years	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools		Secure disposal
SRS.1.1.10	Proposals concerning the change of status of a maintained school including Specialist Status Schools and Academies	Date proposal accepted or declined plus 3 years			Secure disposal
SRS.1.1.11	Records relating to complaints dealt with by the Governing Body or Head Teacher	Date of resolution plus 6 years. Review for further retention in case of contentious disputes.		Yes	Secure disposal
SRS.1.1.12	Reports	Date of report plus 6 years, consider archiving/storing anything important	Retain in school for 6 years from report date.	Potential	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.1.1.13	Reports presented to the Governing Body [1]	Reports should be kept for a minimum of 6 years		Potential	Secure disposal
SRS.1.1.14	Schools Transfer - Case files relating to the transfer of schools to a governing body	Retain from date case closed for 6 years. (Review at end of 6 years)	Limitation Act 1980 (Section 2)	No	
SRS.1.1.15	Trusts and Endowments	For the life of the school	Retain in school. Offer to County Record Office when school closes		

2. Governor Management

2.1 Governor Management

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.2.1.0	All records relating to the appointment and management of School Governors and records relating to the terms of office of serving Governors, including evidence of appointment	Date appointment ceases plus 6 years	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools	Yes	Secure disposal

[1] Retain with the signed set of the minutes However, if the minutes refer directly to individual reports, then the reports should be kept permanently as per SRS.1.1.7.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.2.1.1	Governor HR file	Date appointment ceases plus 6 years	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools	Yes	Secure disposal
SRS.2.1.2	Records relating to DBS checks carried out of members of the governing panel	Date of DBS check plus 6 months	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools	Yes	Secure disposal
SRS.2.1.3	Records relating to training received by Governors	Date appointment ceases plus 6 years	Governance-in-Academy-Trusts or Governance-In-Maintained-Schools	Yes	Secure disposal
SRS.2.1.4	School Governor Elections – and records relating to Ballot papers for Governor appointments	Retain for six months[2]	Including- ballot papers, a record of the count, letters, and other associated paperwork.	Yes	Secure disposal
SRS.2.1.5	Staff and Governors Declaration of Business and Personal Interests	Retain from date appointment ceases or termination of employment for 6 years[3]	Limitation Act 1980 (Section 2)	Yes	Secure disposal

[2] Ballot papers should be retained securely in school for six months in case the election result is challenged, after six months all the paperwork should be destroyed. This follows Electoral Commission general guidance and other legislation for ballot papers. The School Governance (Constitution) (England) Regulations 2012 and amendments do not provide specific guidance in regard to the retention of ballot papers for parent Governor appointments

[3] All records relating to the disclosure of financial and non-financial officer interests that could conflict with the Schools interest

3. Senior Management Team

3.1 Senior Management Team

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.3.1.0	Annual parents' meeting papers	Date of meeting plus 6 years	Retain in school for 6 years from meeting date. Consider archiving/storing anything important.	Potential	Secure disposal
SRS.3.1.1	Circulars (staff, parents, pupils)	Current year plus 1 year	Review to see if further retention period required		Secure disposal
SRS.3.1.2	Complaints files dealt with by the Senior Management Team	Date of resolution of complaint plus 6 years	Review for further retention in the case of contentious disputes.	Yes	Secure disposal.
SRS.3.1.3	Correspondence created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities	Date of correspondence plus 3 years then review		Potential	Secure disposal
SRS.3.1.4	Development plans	Retain for 3 years from date of expiry		Potential	Secure disposal
SRS.3.1.5	Log books	Retain at school for 6 years from date of last entry in log book	Legislation no longer requires the completion of a school log book	Potential	Secure disposal
SRS.3.1.6	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	Retain at school for 3 years from date of meeting		Potential	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.3.1.7	Professional Development Plans	Records should be held on individuals' personnel file. If not termination of employment plus 6 years		Yes	Secure disposal
SRS.3.1.8	Parent Teachers Association/Old Pupils Associations	Current year plus 6 years	Review to see if further retention period required.	Potential	Secure disposal
SRS.3.1.9	Records created by head teachers, deputy head teachers, heads of year and other members of staff with administrative responsibilities (which do not fall under any other category)	Current academic year plus 6 years then review		Potential	Secure disposal
SRS.3.1.10	Reports created by the Head Teacher or the Management Team	Retain at school for 3 years from date of report	There may be data protection issues if the report refers to individual pupils or members of staff. Consider archiving/storing anything important.	Potential	Secure disposal
SRS.3.1.11	School Assessment and Performance - all records relating to the development and implementation of school performance and assessment reports	Retain from year records created for 5 years.			Secure disposal
SRS.3.1.12	School Bullying and Harassment Policy - all records relating to the creation and implementation of the school bullying and harassment policy	Retain from date policy superseded for 3 years.			Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.3.1.13	School Complaints Procedure - all records relating to the management of complaints in schools	Retain from date procedure superseded for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal.
SRS.3.1.14	Schools' Development Plans - all records relating to the development and implementation of school development plans	Life of the plan plus 3 years	Review for further retention.	No	Secure disposal.
SRS.3.1.15	School Prospectuses or School Brochures	Life of the prospectus plus 3 years	School Information (England) Regulations 2008 Regulation 10	Potential	Secure disposal
SRS.3.1.16	School Regulations and Disciplinary Procedures - records relating to the creation and development of school regulation and discipline policies including procedures to be followed in the event of any breach of the rules by pupils	Retain from date policy superseded for 6 years.		No	Secure disposal.
SRS.3.1.17	Schools' Forum - all records relating to the creation, implementation, and management of Schools Forums	Retain from year records created for 6 years.		Potential	Secure disposal.
SRS.3.1.19	Young People's Learning Prospectus - all records relating to the development of a young people's learning prospectus	Retain from date prospectus replaced for 1 year.		Potential	Secure disposal

4. Staff Management

4.1 Staff Records

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.0	Staff - Annual Leave - all records relating to the management of staff annual leave	Retain from creation of records for 3 years.		Yes	Secure Disposal
SRS.4.1.1	Staff - Apprenticeships - records relating to the management of individual staff apprentices	Retain from date of end of apprenticeship for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.4.1.2	Staff - Apprenticeships - records relating to the processes to support the provision and management of staff apprenticeships	Retain from date processes change for 6 years.		No	Standard disposal
SRS.4.1.3	Staff - Benefits - all records relating to the development and implementation of staff benefits	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure Disposal
SRS.4.1.4	Staff - Business Travel - all records relating to leased vehicle allowances and records relating to Staff driving their own vehicles on School business	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure Disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.5	Staff – Childcare Disqualification - Staff & Volunteer Declaration Forms [4]	Retain for one year until superseded		Yes	Secure Disposal
SRS.4.1.6	Staff - Consultation and Feedback - all records relating to the management of staff consultation and feedback	Retain from date consultation completed for 6 years.	Limitation Act 1980 (Section 2)	Potential	Secure Disposal
SRS.4.1.7	Staff - Continuing Professional Development - all records relating to workforce development	Retain from year records created for 3 years.		Yes	Secure Disposal
SRS.4.1.8	Staff - Counselling and Occupational Health referrals - all records relating to the provision of services regarding counselling, occupational health and ensure that staff are supported and fit for work.	Cessation of employment plus 6 years		Yes	Secure Disposal

[4] The obligation on schools is to comply with the requirements of the United Kingdom General Data Protection Regulation (UK GDPR) and the Data Protection Act 2018, this is confirmed in the statutory guidance – Disqualification under the Childcare Act 2006 (August 2018) – "What this means for individuals, schools, and employers". The guidance provides you only need to record the date satisfactory checks were made as either a separate record or as part of the Single Central Record. Personal data, including any details of an individual's criminal record, should not be held without consent from the individual. In instances where an individual does not consent to their personal data being held, schools should only record the date the declaration was made, details of any additional safeguarding restrictions, and whether or not an Ofsted waiver has been granted.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.9	Staff - Employee Relations - All records relating to Employee relations including equal opportunities, performance monitoring, trade union, discipline, grievance and conducting staff surveys	Retain from date policy superseded for 3 years.		Potential	Secure Disposal
SRS.4.1.10	Staff - Employment and Career - all records relating to an individual's employment history - voluntary service	Retain from end or termination of employment for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.4.1.11	Staff - Employment and Career - all records relating to termination of employment, for example early retirement, severance, or death in service	Retain from termination for 6 years (Recommended period)		Yes	Secure disposal
SRS.4.1.12	Staff - Employment and Career - Employee Files and Personal Development Records, Staff Pension, Pay History, Contracts, Offer Letters, and Termination Reasons	Retain from end or termination of employment for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.4.1.13	Staff - Employment Claims - all records relating to advice on human resources litigation matters on claims made against the school including employment tribunal claims.	Retain from closure plus 6 years.	Review at end of 6 years.	Yes	Secure disposal
SRS.4.1.14	Staff - Employment Tribunals - all records relating to Employment Tribunal	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.15	Staff - Employment Tribunals - Case files relating to Employment Tribunal Claims and other employment matters[5]	Retain from date of closure for 6 years	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.4.1.16	Staff - Home Working - records relating to equipment and assistance given to members of staff to facilitate home working	Retain from date normal working practices resume for 6 years.		Yes	Secure disposal
SRS.4.1.17	Staff - Job Analysis - all records relating to the development and implementation of job descriptions and person specifications	Retain from date job description/person specification superseded for 6 years.		Yes	Secure disposal
SRS.4.1.18	Staff - Job Analysis - all records relating to the evaluation of jobs	Retain from date job evaluation completed for 6 years.		Yes	Secure disposal
SRS.4.1.19	Staff - Medicals and Health Screening - all records relating to employee eye tests	Retain from date of test until new eye test completed. usually 2 years.)		Yes	Secure disposal
SRS.4.1.20	Staff - Occupational Health - Health Referral files	Retain from date of birth for 85 years.		Yes	Secure disposal
SRS.4.1.21	Staff - Occupational Health - Health Surveillance forms	Retain from date of questionnaire for 40 years.		Yes	Secure disposal

[5] Review at end of 6 years. A complaint cannot be entertained unless it is presented to the Industrial Tribunal before the end of the period of 3 months beginning with the date on which the ground for the complaint arose, or other such period as the tribunal considers reasonable. For a redundancy payment, a claim must be presented within 6 months beginning with the relevant date.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.22	Staff - Outplacement - all records relating to individuals who are made redundant	Retain from the date of birth of the individual made redundant for 80 years.		Yes	Secure disposal
SRS.4.1.23	Staff - Outplacement - all records relating to staff transferred to other organisations (TUPE)	Retain from date of transfer for 6 years.	Transfer of Undertakings (Protection of Employment) Regulations 2006	Yes	Secure Disposal
SRS.4.1.24	Staff - Overtime - all records relating to the management of staff overtime payments	Retain from creation of records for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure Disposal
SRS.4.1.25	Staff - Personal Protective Equipment - records relating to the allocation of PPE to individual members of staff	Retain from date staff members leaves employment for 6 years.		Yes	Secure Disposal
SRS.4.1.26	Staff - Procedures - all records relating to the management of staff procedures	Retain for 3 years from date procedure superseded.		Yes	Secure Disposal
SRS.4.1.27	Staff - Public Holidays - all records relating to the publication of a policy on public holidays	Retain for 3 years from the date the policy is superseded		Yes	Secure Disposal
SRS.4.1.28	Staff - Recognition - all records relating to schemes which recognise staff	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure Disposal
SRS.4.1.29	Staff - Risk Management - Personal risk assessment records for staff working with children or vulnerable adults	Retain from termination of employment for 20 years.		Yes	Secure Disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.30	Staff - Risk Management - Personal risk assessments relating to individuals returning to work	Retain from date of reference for 6 years.	Limitation Act 1980 (Section 11)	Yes	Secure Disposal
SRS.4.1.31	Staff - Sickness Management Absence Monitoring - all records relating to the monitoring of employee absence	Retain from year records created for 1 year to enable monitoring over a 12-month period		Yes	Secure disposal
SRS.4.1.32	Staff - Team Meetings/Management Team meetings minutes and papers held by individual teams where no corporate school decisions are made	Retain from date of meeting for 1 year. (Review at end of 1 year)	(Review at end of 1 year retention period.)	Potential	Secure disposal
SRS.4.1.33	Staff - Time Management - all records relating to the process of monitoring staff leave and attendance	Retain from date action completed for 2 years.		Yes	Secure disposal
SRS.4.1.34	Staff - Training - all notes and materials created for training courses	Retain from date material created until date training course ends.		Yes	Secure disposal
SRS.4.1.35	Staff - Training - all records relating to the creation and management of training statistics	Retain from year records created for 3 years.		Potential	Secure disposal
SRS.4.1.36	Staff - Training - all records relating to the development and implementation of training programmes	Retain from year records created for 3 years.		Yes	Secure disposal
SRS.4.1.37	Staff - Training - all records relating to the development, implementation, and monitoring of the corporate school training plan	Retain from date training plan expires for 3 years.		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.38	Staff - Training - all records relating to training concerning children. Where the training relates to safeguarding retain on Staff HR File [SRS.4.1.12]	Retain from date training completed for 40 years.		Yes	Secure disposal
SRS.4.1.39	Staff - Training - all records relating to training not concerning children	Retain from date training completed for 3 years.		Yes	Secure disposal
SRS.4.1.40	Staff - Victimisation - all records relating to the development and implementation of a policy dealing with reports of victimisation in the workplace for school employees	Retain from date policy superseded for 6 years.		Yes	Secure disposal
SRS.4.1.41	Staff - Whistleblowing - all records relating whistleblowing reports and documents linked to an investigation which is partially or wholly substantiated.	Retain from 6 months following the outcome of the report, or any remedial action taken because of the report.		Yes	Secure disposal
SRS.4.1.42	Staff - Workforce Development - all records relating to Workforce Development to provide training courses relevant to the requirements of the workforce and provide staff benefits.	Retain from cessation of employment plus 6 years		Yes	Secure disposal
SRS.4.1.43	Staff - Workplace Bullying - Casework - Harassment	Retain from date case resolved for 6 years.		Yes	Secure disposal
SRS.4.1.44	Staff Annual Appraisal/Assessment - all records relating to the processes to support the management of staff performance	Annual appraisal records should be retained for 1 year until superseded.	Retain whilst individual is employed and for six years from the date of termination of employment	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.1.45	Staff Supervision - all records relating the supervision of individuals working in a social care environment (both adults and children)	Retain from termination of employment for 6 years.		Yes	Secure disposal
SRS.4.1.46	Timesheets	Current year plus 6 years		Yes	Secure disposal
SRS.4.1.47	Single Central Record, including records of required pre-employment and safer recruitment checks for staff, governors, volunteers, agency workers, contractors and other relevant individuals. This includes current and leaver entries.	For current individuals, retain while engaged by the school. For leavers, retain from date employment or engagement ends plus 6 years, then review.[6]		Yes	Secure disposal

[6] Leaver entries should be clearly marked or moved to a leavers/inactive section rather than deleted immediately. The SCR should evidence that required checks were completed during the period of engagement.

4.2 Disciplinary and Grievance Process

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.2.0	Staff Safeguarding Allegations and Harm Threshold Concerns and allegations of a child protection nature against a member of staff including where the allegation is unfounded[7]	Substantiated safeguarding allegations and allegations meeting the harm threshold: retain until normal retirement age or 10 years from the date of the allegation, whichever is longer, then review.	Keeping children safe in education - Statutory guidance for schools and colleges on safeguarding children and safer recruitment	Yes	Secure disposal
SRS.4.2.1	Safeguarding Allegation or Investigation Resulting in No Further Action	Retain until conclusion of the investigation. Where the matter relates to safeguarding, manage in accordance with SRS.4.2.0.	Includes allegations that are unfounded, false or unsubstantiated where no further employment action is required.	Yes	Secure disposal
SRS.4.2.2	Disciplinary Proceedings – Oral Warning	12 months from the date of decision.	Retention may be extended where linked to ongoing investigations, litigation or safeguarding matters.	Yes	Secure disposal

[7] Records relating to safeguarding allegations against staff, volunteers, contractors or governors should be categorised as substantiated, unsubstantiated, unfounded, false, malicious, low-level concerns or allegations meeting the harm threshold and managed in accordance with the current version of Keeping Children Safe in Education and school safeguarding procedures. Records relating to allegations determined to be malicious should not be retained on the individual's personnel file. A separate record of the investigation outcome may be retained where necessary to evidence the decision reached. Records must not be destroyed where they are subject to a legal hold, safeguarding review, ongoing investigation, regulatory action, litigation, public inquiry or information access request.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.2.3	Disciplinary Proceedings – Written Warning	12 months from the date of decision.	Where the warning relates to safeguarding concerns or allegations that meet the harm threshold, retain in accordance with SRS.4.2.0.	Yes	Secure disposal
SRS.4.2.4	Disciplinary Proceedings – Final Written Warning	12 months from the date of decision.	Where the warning relates to safeguarding concerns or allegations that meet the harm threshold, retain in accordance with SRS.4.2.0.	Yes	Secure disposal
SRS.4.2.5	Staff Disciplinary Case Files	Close of case plus 6 years. Review at end of retention period.	Includes investigation reports, hearing records, correspondence and appeal documentation.	Yes	Secure disposal
SRS.4.2.6	Staff Disciplinary Case Files Resulting in Dismissal	Cessation of employment plus 6 years. Where dismissal relates to gross misconduct involving safeguarding concerns, retain for 25 years from cessation of employment.	Review prior to disposal where safeguarding, legal proceedings, regulatory investigations or legal holds apply.	Yes	Secure disposal
SRS.4.2.7	Staff Disciplinary Case Files Resulting in No Case to Answer	Retain until conclusion of the investigation and any appeal process.	Where linked to safeguarding allegations, refer to SRS.4.2.0.	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.2.8	Staff Grievance Records	Resolution of grievance plus 6 years.	Includes formal grievances, investigations, outcomes, mediation records and appeals.	Yes	Secure disposal
SRS.4.2.7	Staff - Disciplinary Procedures - Casework: Disciplinary where the case results in no case to answer	Retain from start of investigation until end of the investigation		Yes	Secure disposal
SRS.4.2.8	Staff - Grievance	Retain from date grievance resolved for 6 years.		Yes	Secure disposal

4.3 Payroll and Pensions

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.4.3.0	Adoption payments	Current year plus 3		Yes	Secure disposal
SRS.4.3.1	Paternity payments	Current year plus 3		Yes	Secure disposal
SRS.4.3.2	Payroll	Current year plus 6		Yes	Secure disposal
SRS.4.3.3	Payslips - copies	Current year plus 6		Yes	Secure disposal
SRS.4.3.4	Pension Records for active members and about employees and workers including opt in / opt out records.	Current year plus 6 years		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.4.3.5	Pension Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	Current year plus 6 years	Retirement Benefits Schemes (Information Powers) Regulations 1995	Yes	Secure disposal
SRS.4.3.6	Staff - Expenses - all records relating to the payment of legitimately incurred business expenses to Staff and others working for the School.	Retain from creation of records for 6 years.		Yes	Secure disposal
SRS.4.3.7	Staff - Payroll - all records relating to shared parental, paternity and adoption pay	Retain from tax year in which the maternity period ends for 3 years.		Yes	Secure disposal
SRS.4.3.8	Staff - Payroll - all records relating to the administration of parental leave where the child is disabled	Retain from date of birth of child for 18 years.		Yes	Secure disposal
SRS.4.3.9	Staff - Payroll - all records relating to the administration of parental leave where the child is not disabled	Retain from date of birth of child for 6 years.		Yes	Secure disposal
SRS.4.3.10	Staff - Payroll - all records relating to the administration of Statutory Maternity Pay including Mat B1s	Retain from tax year in which the maternity period ends for 3 years.		Yes	Secure disposal
SRS.4.3.11	Staff - Pension Scheme - all records relating to information to provide a pension scheme for employees.	Retain from cessation of employment plus 13 years		Yes	Secure disposal
SRS.4.3.12	Staff - Statutory Sick Pay - all records relating to the administration of Statutory Sick Pay (SSP) records, calculations, certificates, self-certificates, occupational health reports. Also, COVID-19-related SSP claims	Retain for 3 years from Tax year to which the sick pay relates.	The Statutory Sick Pay (General) Regulations 1982	Yes	Secure disposal

4.4 Recruitment

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.4.0	All records leading up to the appointment of a new Headteacher	All the relevant information should be added to the Staff HR File [SRS.4.1.12] and all other information retained for 6 months.		Yes	Secure disposal
SRS.4.4.1	All records leading up to the appointment of a new member of staff – successful candidate	All the relevant information should be added to the Staff HR File [SRS.4.1.12] and all other information retained for 6 months		Yes	Secure disposal
SRS.4.4.2	All records leading up to the appointment of a new member of staff – unsuccessful candidates	Date of appointment of successful candidate plus 6 months		Yes	Secure disposal
SRS.4.4.3	Interview notes and recruitment records	Date of interview notes plus 6 months if unsuccessful. If successful place in personnel file.		Yes	Secure disposal
SRS.4.4.4	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom [8]	Termination of employment plus not less than two years.	Employer's Guide to Right to Work Checks: 23 September 2024	Yes	Secure disposal

[8] Where possible these documents should be added to the Staff HR File [SRS.4.1.12], Where records are kept separately then the Home Office requires that the documents are kept for termination of employment plus not less than two years.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.4.5	Identity and supporting documents used for a DBS check, including checks involving the DBS Update Service. [9]	Notes/copies should be added to the Staff HR File [SRS.4.1.12] and originals returned.		Yes	Secure disposal
SRS.4.4.6	Staff - Current Vacancies - all records relating to the publication of current job vacancies within the school	Retain from year records created for 1 year.	It is expected that this will be a dynamic list which is constantly updating		
SRS.4.4.7	Staff - Recruitment - all records relating to recruitment for available job roles that individuals apply for and information about the suitability of candidates from referees.	Retain for up to 12 months for unsuccessful candidates, for successful candidates from cessation of employment for 6 years		Yes	Secure disposal
SRS.4.4.8	Staff - Recruitment Process - all records relating to Criminal Records Bureau/Disclosure and Barring Service [10]	Retain from date check completed for 6 months. Destroy copies of certificates after 6 months.	Disclosure and Barring Service Checks: Guidance for Employers	Yes	Secure disposal

[9] Where possible these should be checked and a note/copy of what was checked placed on personnel file. If felt necessary to keep any documentation, there should be a valid reason for doing so and it should not be kept for longer than six months

[10] Relevant information should be recorded on the school Single Central Record whilst the individual is employed. Copies of DBS certificates and records of criminal information disclosed by the candidate are covered by UK GDPR/DPA 2018 Article 10. Schools and colleges **do not have to keep copies** of DBS certificates, in order to fulfil the duty of maintaining the Single Central Record when a school or college chooses to retain a copy, there should be a valid reason for doing so and it should not be kept for longer than six months. When the information is destroyed a school or college may keep a record of the fact that vetting was carried out, the result and the recruitment decision taken if they choose to.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.4.9	Staff - Recruitment Process - all records relating to the development and implementation of terms and conditions of employment	Retain from date terms and conditions expire for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.4.4.10	Staff - References - all records relating to the management of the provision of staff references	Retain from date of reference for 6 years.		Yes	Secure disposal

4.5 Contract and Supply Staff

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.4.5.0	All records relating to the checking/vetting of contract and supplier staff. [11]	Retain from date check carried out for 6 years.	Disclosure and Barring Service Checks: Guidance for Employers and School Staffing (England) Regulations 2009 (Sch 2)	Yes	Secure disposal

[11] There is an obligation to record on the Single Central Record register that checks have been undertaken in regard to any person supplied by an employment business or agency to work at a school

5. Financial Management

5.1 Finance and School Fund

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.5.1.0	16 to 19 bursary funds - all records relating to the administration of the 16-19 bursary funds	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure disposal
SRS.5.1.1	All records relating to the creation and management of budgets including the annual budget statement and background papers	Life of the budget plus 3 years			Secure disposal
SRS.5.1.2	Annual Accounts	Current year plus 6 years			Secure disposal
SRS.5.1.3	Annual budget and background papers	Current year plus 6 years			Secure disposal
SRS.5.1.4	Bank statements	Current year plus 6 years			Secure disposal
SRS.5.1.5	Budget reports, budget monitoring etc.	Current year plus 3 years			Secure disposal
SRS.5.1.6	Cheque books	Current year plus 6 years			Secure disposal
SRS.5.1.7	Copy orders	Current year plus 2 years			Secure disposal
SRS.5.1.9	Debtors' records	Current year plus 6 years	Limitation Act 1980 (Section 2)		Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.5.1.10	Free school meals - records relating to the administration of free school meals schemes	Retain from financial year records were created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Potential	Secure disposal
SRS.5.1.11	Free School Meals Registers	Current year plus 6		Yes	Secure disposal
SRS.5.1.12	Inventories of furniture and equipment	Current year plus 6 years			Secure disposal
SRS.5.1.13	Invoices, receipts, order books and requisitions, delivery notices	Current financial year plus 6 years			Secure disposal
SRS.5.1.14	Journey Books	Current year plus 6 years			Secure disposal
SRS.5.1.15	Ledger	Current year plus 6 years			Secure disposal
SRS.5.1.16	Loans and grants managed by the school	Date of last payment on the loan plus 12 years			Secure disposal
SRS.5.1.17	Monitoring records	Current year plus 2 years			Secure disposal
SRS.5.1.18	Order books and requisitions	Current year plus 6 years			Secure disposal
SRS.5.1.19	Paying in books	Current year plus 6 years			Secure disposal
SRS.5.1.20	Petty cash books	Current year plus 6 years			Secure disposal
SRS.5.1.21	Receipts	Current year plus 6 years			Secure disposal
SRS.5.1.22	Records relating to the collection and banking of monies	Current financial year plus 6 years			Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.5.1.23	Records relating to the identification and collection of debt	Current financial year plus 6 years			Secure disposal
SRS.5.1.24	School Catering - all records relating to the provision of school catering services	Retain from end of the contract for 6 years	HMRC - Compliance Handbook Manual CH15400		Secure disposal
SRS.5.1.25	School Meals Registers	Current year plus 3		Yes	Secure disposal
SRS.5.1.26	School Meals Summary Sheets	Current year plus 3		Yes	Secure disposal
SRS.5.1.27	Student Grant applications	Current year plus 3 years		Yes	Secure disposal

5.2 Contract Management

Ref.	Record Type	Retention Period	Statutory Provision /Notes	Data Protection Considerations	Disposal Action
SRS.5.3.2	All records relating to the due diligence, management and monitoring of contracts	Until superseded replaced			Secure disposal
SRS.5.3.1	All records relating to the management and monitoring of contracts under seal	Last payment on the contract plus 12 years	Limitation Act 1980 (Section 2)		Secure disposal
SRS.5.3.3	All records relating to the management and monitoring of contracts under signature	Last payment on the contract plus 6 years	Limitation Act 1980 (Section 2)		Secure disposal
SRS.5.3.4	All records relating to the management and monitoring of deed or contract under seal	Last payment on the contract plus 12 years	Limitation Act 1980 (Section 2)		

6. Operational Administration

6.1 General

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.1.0	Biometric data that is held about specific of individuals. [12]	As long as consent is provided	Protection of Freedoms Act 2012 Section 26-28	Yes	Secure deletion
SRS.6.1.1	CCTV images [13].	Retain from 28 days to a maximum of 31 days	Biometrics and Surveillance Camera Commissioner Surveillance Camera Code of Practice and Protection of Freedoms Act 2012	Yes	Secure deletion
SRS.6.1.2	Consents relating school activities as part of UK GDPR compliance (e.g. mailing lists, photography consents)	Consent applies whilst the pupil attends the school then destroy		Yes	Secure disposal
SRS.6.1.3	General file series (which do not fit under any other category)	Current year plus 5 years then review		Potential	Secure disposal

[12] Only use for the purpose with which it has been obtained). Biometric data should be stored by the school for as long as consent is provided (and not withdrawn. Once a student or staff member leaves, the biometric data should be deleted from the school system no later than 72 hours after the individual leaves the school or consent is withdrawn.

[13] Schools are advised that the retention period for CCTV images and/or recordings should be normally a maximum of 28 days, unless footage has been isolated and retained for a documented incident, such as criminal behaviour or a risk to health and safety and are retained to investigate investigation, claim, safeguarding matter, information request or legal hold.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.1.4	Head lice - all records relating to the provision of advice to schools, parents and children on prevention and dealing with head lice	Retain from year records created for 1 year.	It is expected that this will be a dynamic list which is constantly updating.	Yes	Secure disposal
SRS.6.1.5	Learning Mentors - all records relating to the management of learning mentors	Retain from last contact with mentor for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.6.1.6	Mentoring schemes - all records relating to the administration of learning mentor schemes	Retain from last contact with mentor for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.6.1.7	Newsletters and other items with a short operational use	Current year plus 1 year			Standard disposal
SRS.6.1.9	Photographs of individuals	Only use for the purpose with which it has been taken. Destroy after individual leaves school		Potential	Secure disposal
SRS.6.1.10	Records relating to the creation and distribution of circulars to staff, parents or pupils	Current year plus 1 year			Standard disposal
SRS.6.1.11	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Current year plus 6 years then		Potential	Secure disposal
SRS.6.1.12	Records relating to the creation and publication of the school brochure or prospectus	Current year plus 3 years		Potential	Secure disposal
SRS.6.1.13	School Book Purchase Schemes - all records relating to the administration of schoolbook purchase schemes	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	No	Standard disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.1.14	School Health Promotions - all records relating to school health promotions	Retain from date campaign ends for 3 years.		No	Standard disposal
SRS.6.1.15	School Inspection - all records relating to school inspection	Retain from date of the inspection for 6 years.		No	Standard disposal
SRS.6.1.16	School Nursing - records relating to the processes to ensure the provision of the school nursing service	Retain from date processes change for 6 years.		Potential	Secure disposal
SRS.6.1.17	Standing advisory council on religious education (SACRE) - all records relating to the administration of Standing Advisory Councils on Religious Education	Retain from date meeting held for 6 years.		No	Standard disposal
SRS.6.1.18	Visitors' management systems (including electronic systems, visitor books and signing in sheets)	Current year plus 2 years		Yes	Secure disposal
SRS.6.1.19	Walking Bus Registers	Date of register plus 3 years		Yes	Secure disposal

6.2 DP and FOI

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.2.0	Data Protection - all records relating to the creation and implementation of policies under the UK GDPR and DPA18	Retain from date policy expires for 3 years.		No	Standard disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.2.1	Data Protection - all relating to the management of subject access requests under UK GDPR and DPA18	Retain from year records created for 3 years.		Yes	Secure disposal
SRS.6.2.2	Data Protection - records relating to the creation of Data Protection Impact Assessments	Retain from year records created until superseded		Potential	Secure disposal
SRS.6.2.3	Data Protection - records relating to the development, implementation of maintenance of the Record of Processing Activities (ROPA) under Article 30 of the UK GDPR	Retain from year records created until superseded		No	Secure disposal
SRS.6.2.4	FOI and EIR - all records relating to the management of requests for information under the Freedom of Information Act 2000 requests or the Environmental Information Regulations	Retain from year records created for 3 years.		Yes	Secure disposal
SRS.6.2.5	FOI and EIR - policies and procedures developed for managing requests for information under the Freedom of Information Act 2000 or the Environmental Information Regulations	Retain from date policy expires for 3 years.		No	Standard disposal
SRS.6.2.6	Non-Supporting or Ephemeral records. Documents or data that do not fit into the definition of supporting documents or records described elsewhere in the retention schedule.[14]	Retained locally for 4-weeks to six months dependent on the nature of the record.		Potential	Secure disposal

14 Where records are of a general nature. For example, general enquiries, internal templates, front cover sheets and includes information in a document has been recorded and incorporated elsewhere as an electronic supporting record any electronic records should be deleted, and paper records must be destroyed via confidential waste

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.2.7	Records - General Management - general administrative records, including routine correspondence relating to the provision of information management services	Retain from year records created for 2 years		Potential	Secure disposal
SRS.6.2.8	Records Disposal - Correspondence and papers relating to the compilation of disposal schedules	Retain for 10 years from years records created.		Potential	Secure disposal
SRS.6.2.9	Records Disposal - records relating to Disposal schedules, lists, certificates, docket books or databases of records destroyed	Retain permanently		Potential	Secure disposal
SRS.6.2.10	Records Management - all records relating to the development and implementation of information surveys (or created to develop and implement information audits)	Retain from date information survey expires or date the information audit superseded f for 3 years.		Potential	Secure disposal
SRS.6.2.11	Records Storage - records relating to contracts with storage providers	Retain for 6 years from end of contract.		Potential	Secure disposal
SRS.6.2.12	Records Storage - records relating to the retrieval of records from off-site storage	Retain from year records created for 2 years		Potential	Secure disposal
SRS.6.2.13	Records Storage - records relating to the security of records	Retain from date created for 5 years.		Yes	Secure Disposal
SRS.6.2.14	Records Storage - records relating to the use of on-site storage areas	Retain from year records created for 2 years		No	Standard disposal

6.3 Health and Safety

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.3.0	Accessibility Plans	Current year plus 6 years	Equality Act 2010 Schedule 10	Potential	Secure disposal
SRS.6.3.1	Accident Reporting - Adults (over 18 at time of incident)	Date of the incident plus 6 years		Yes	Secure disposal
SRS.6.3.2	Accident Reporting - Children (under 18 at time of incident)	DOB of the child plus 25 years		Yes	Secure disposal
SRS.6.3.3	Control of Substances Hazardous to Health (COSHH)	Date of incident plus 40 years	Control of Substances Hazardous to Health Regulations 2002. Regulation 11	Yes	Secure disposal
SRS.6.3.4	Fire Precautions log books	Current year plus 6 years		No	Secure disposal
SRS.6.3.5	Health and Safety Policy Statements	Life of policy plus 3 years	The Health and Safety at Work Act 1974. See also DfE Guidance - Health and safety: responsibilities and duties for schools -		Secure disposal
SRS.6.3.6	Health and Safety Risk Assessments - The Management of Health and Safety at Work Regulations 1999 impose a duty to produce a risk assessment	Life of risk assessment plus 3 years. Copy of the risk assessment should be stored with accident report if relevant	The Management of Health and Safety at Work Regulations 1999.		Secure disposal
SRS.6.3.7	Minor Accident Reporting Books - Children & Adults	Date of last entry plus 3 years		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.3.8	Policy statements	Date of expiry plus 1 year			Secure disposal
SRS.6.3.9	Process of inspecting and testing equipment	Retain from date of inspection for 6 years.	Limitation Act 1980 (Section 2)		Secure disposal
SRS.6.3.10	Process of monitoring of areas where employees and persons are likely to have become in contact with asbestos	Last action plus 40 years	Control of Asbestos at Work Regulations 2012 SI 2012/632 Regulation 19		Secure disposal
SRS.6.3.11	Process of monitoring of areas where employees and persons are likely to have become in contact with radiation	Last action plus 50 years			Secure disposal
SRS.6.3.12	Records relating to accident/injury at work	Date of incident plus 12 years	In the case of serious accidents, a further retention period will need to be applied	Yes	Secure disposal
SRS.6.3.13	School Health And Safety - all other records relating to the maintenance of health and safety in schools	Retain from year records created for 3 years and 4 months. (Minimum recommendation.)	Limitation Act 1980 (Section 11)	No	Standard disposal

6.4 Risk Management and Insurance

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.4.0	Employer's Liability Insurance Certificate	Closure of the school plus 40 years			Secure disposal
SRS.6.4.1	Risk assessments -other risk assessments not connected to Health and Safety	Current year plus 3 years			Secure disposal

6.5 Information and Communications Technology

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.5.0	ICT - Business Continuity Plans including all records relating to the development of business continuity plans	Retain from creation of plans until superseded,	It is expected that these will be dynamic documents which are constantly updating.		Secure disposal
SRS.6.5.1	ICT - Data Management - all records relating to the creation and implementation of security measures for information systems	Retain from date system commissioned until date system decommissioned.			Secure disposal
SRS.6.5.2	ICT - Security - All information relating to user profiles for information systems	Retain from year records created for 6 years.			Secure disposal
SRS.6.5.3	ICT - Security - all records relating to the creation and implementation of policy and procedures relating to information security	Retain from year records created for 3 years			Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.5.4	ICT - Software - all records relating to software licenses for information systems, applications and SaaS	Retain from date system decommissioned for 6 years.			Secure disposal
SRS.6.5.5	ICT - Website - all records relating to the creation and maintenance of the School website	Retain from creation of records for 3 years.			Secure disposal

6.6 School Libraries

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.6.0	Book exhibitions - all records relating to the provision of book exhibitions to schools	Retain from year records created for 1 year.		Potential	Secure disposal
SRS.6.6.1	Children's libraries - All records relating to the management of Children's Libraries	Retain from year records created for 6 years.	Limitation Act 1980 (Section 11)	Potential	Secure disposal
SRS.6.6.2	School Library Loans - all records relating to the provision of school library loans	Retain from date loan commences until date loan ends.		Potential	Secure disposal
SRS.6.6.3	School Library Service - Advice and Training - all records relating to the administration of the school library service	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Potential	Secure disposal
SRS.6.6.4	School Library Visits -all records relating to the provision of school library visits	Retain from year records created for 3 years.		Potential	Secure disposal
SRS.6.6.5	Special needs library facilities - all records relating to the management of special needs library facilities	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Potential	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.6.6	Teenagers' library services - all records relating to the management of teenage library services	Retain from year records created for 6 years.		Potential	Secure disposal
SRS.6.6.7	Toy libraries - all records relating to the provision of toy libraries	Retain from date of loan until date loan ends.		Potential	Secure disposal

6.7 Property Management

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.7.0	All records relating to the maintenance of the school	Retain whilst the building belongs to the school.	Pass on to new owners if building is leased or sold		Secure disposal
SRS.6.7.1	Burglary, theft and vandalism report forms	Current year plus 6 years			Secure disposal
SRS.6.7.2	Contractors' reports	Current year plus 6 years			Secure disposal
SRS.6.7.3	Facilities - handling units and air conditioning - all records relating to the management on air handling units and air conditioning in properties owned by the school	Retain from creation of records for 6 years.			Secure disposal
SRS.6.7.4	Facilities – Planned Maintenance - all records relating to planned maintenance on School land and property	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)		Secure disposal
SRS.6.7.5	Facilities - Planned Maintenance - all records relating to the refurbishment of buildings owned by the School	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)		Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.7.6	Facilities - reactive repairs - all records relating to unplanned repairs to premises or facilities equipment	Retain from date repairs completed for 6 years.	Limitation Act 1980 (Section 2)		Secure disposal
SRS.6.7.7	Facilities Management - all records relating to the provision of security in School buildings including perimeter fencing and gates.	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)		Secure disposal
SRS.6.7.8	Leases of property belonging to the school	Expiry of lease plus 6 years			Secure disposal
SRS.6.7.9	Maintenance and contractors	Current year plus 6 years	HMRC - Compliance Handbook Manual CH15400		Secure disposal
SRS.6.7.10	Maintenance log books	Last entry plus 10 years			Secure disposal
SRS.6.7.11	Outdoor play facilities - all records relating to the provision and maintenance of outdoor play facilities	Retain from date play facility closes for 7 years.			Secure disposal
SRS.6.7.12	Plans of property belonging to the school	Retain whilst the building belongs to the school	Pass on to new owners if building is leased or sold		Secure disposal
SRS.6.7.13	Records relating to the letting of the school premises	Current financial year plus 6			Secure disposal
SRS.6.7.14	Sports ground safety certificate - all records relating to safety at school sports grounds records	Retain from year records created for 3 years.	Limitation Act 1980 (Section 2)		Secure disposal
SRS.6.7.15	Title Deeds	Permanently	These should follow the property		

6.8 Transport

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.8.0	Education transport - all records relating to the provision of transport for 16–19-year-olds	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure disposal
SRS.6.8.1	Education transport - applications for provision of school transport - Years 12 and 13 - electronic applications	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure disposal
SRS.6.8.2	Education transport - Home to College Transport applications - accepted	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure disposal
SRS.6.8.3	Education transport - Home to College Transport applications - refusals for students under 16 and over 19	Retain from year records created for 1 year.		Yes	Secure disposal
SRS.6.8.4	Education transport - Home to College Transport applications - student withdrawals	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Yes	Secure disposal
SRS.6.8.5	School Transport - all records relating to Free School Transport to administer the application, assessment, and administration of free school transport.	Retain from year records created for 6 years.	Retain from date of birth of child for 25 years. Home to school transport (ineligible applicants) retain from date of birth of child for 18 years		Secure disposal
SRS.6.8.6	School Transport - all records relating to the administration of school transport - where transport is not provided	Retain from date appeal process is completed for 1 year.		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.6.8.7	School Transport - all records relating to the administration of school transport - where transport is provided	Retain from date transport ceases for 6 years.	Limitation Act 1980 (Section 2)	Potential	Secure disposal
SRS.6.8.8	School Transport - applications for provision of school transport - Primary and Secondary Schools - electronic applications	Retain primary school applications until child leaves primary school for secondary school applications keep until child completes year 11 then review depending on whether the child continues in education.		Yes	Secure disposal
SRS.6.8.9	School Transport - Letters refusing applications for Home to School Transport	Retain from date of birth of child for 18 years.	Retain from date of birth of child for 25 years. Home to school transport (ineligible applicants) retain from date of birth of child for 18 years	Yes	Secure disposal
SRS.6.8.10	Special Educational Needs and Disability (SEND) Transport - all records relating to the allocation and provision of home to school transport for special needs pupils	Retain from date transport provision ceases for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

7. Pupil Management

7.1 Admissions and Attendance

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.1.0	Administration of Medication	Retain for 25 years from the pupil's date of birth		Yes	Secure disposal
SRS.7.1.1	Admission Registers [15]	6 years from the last entry in register.		Yes	Review
SRS.7.1.2	Admissions - all records relating to processes supporting school admissions	Retain from date processes change for 6 years.		No	
SRS.7.1.3	Admissions - if the admission is successful	Admission plus 1 year		Yes	Secure disposal
SRS.7.1.4	Admissions - if the appeal is unsuccessful	Resolution of case plus 1 year		Yes	Secure disposal
SRS.7.1.5	Admissions - records relating to school admissions relating to individual pupils	Retain for 1 year after date appeal process completed	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.6	Admissions – Secondary Schools – Casual	Current year plus 1 year	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.7	All records relating to the creation and implementation of the School Admissions' Policy	Life of the policy plus 3 years then review	School Admissions Appeals Code 2022	No	Secure disposal

[15] Every entry in the admission register must be preserved for a period of six years after the date on which the entry was made. Admission registers are not commonly created in paper format. Schools may want to retain permanently as an archive record

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.1.8	Attendance registers[16]	3 years from the last entry in the register		Yes	Secure disposal
SRS.7.1.9	Attendance Reports run by the school in order to send home letters of concern[16]	Keep in line with 7.1.11 Correspondence relating to absence (authorised and unauthorised) – retain for 2 years from end of academic year.		Yes	Secure disposal
SRS.7.1.10	Attendance Returns	Current year plus 1 year		Yes	Secure disposal
SRS.7.1.11	Correspondence relating to absence (authorised and unauthorised)	Retain for 2 years from end of academic year		Yes	Secure disposal
SRS.7.1.12	In year Nursery, Primary and Secondary School admissions - records relating to In year Nursery, Primary School, and Secondary admissions to administer the application, assessment, and provision of school places	Year records created plus 1 year.		Yes	Secure disposal
SRS.7.1.13	Permitted absence from school - all records relating to permitted absence from school	Retain from date of absence for 2 years.	See The Education Act 1996 (Section 444A) and Education and Inspections Act 2006 (Section 103)	Yes	Secure disposal
SRS.7.1.14	Primary school places - all records relating to the allocation of primary school places	Retain from year records created for 1 year.	School Admissions Appeals Code 2022	Yes	Secure disposal

16 Working together to improve school attendance - Statutory guidance for maintained schools, academies, independent schools and local authorities

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.1.15	Proofs of address supplied by parents as part of the admissions process	Retain for 1 year from the date of admission		Yes	Secure disposal
SRS.7.1.16	School Admission Appeals - all records relating to the administration of school appeals	Retain from end of the appeal process for 2 years. (Minimum recommendation.)	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.17	School Admissions - all records relating to School admissions to administer the application, assessment, and provision of school places.	Primary and Secondary school places retain from year records created for 1 year. Special Educational Needs and Disability (SEND) places retain from date of birth of child for 35 years	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.18	School and Holiday Clubs including Ofsted-registered out of school clubs – registers and attendance[17]	3 years from the last entry in the register		Yes	Secure disposal

[17] Non-statutory Government guidance for after-school clubs, community activities and tuition safeguarding guidance for providers states that under the UK GDPR and DPA 18 that after school settings should not retain personal information longer than necessary and that how long settings need to retain information will be based on the setting's needs and legal requirements. Where school and holiday clubs would fall under a school's governance and Ofsted registration It would make sense to use the same retention period as the school for registers of However you may want to use a different minimum retention period for the after school and holiday club attendance records and document it in a privacy notice.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.1.19	School Attendance and Truancy - records relating to Education Penalty Notices (EPN) [18]	Retain from date of birth of the pupil for 25 years.	The Education (Penalty Notices) (England) Regulations 2007	Yes	Secure disposal
SRS.7.1.20	School Attendance and Truancy - all records relating to the management of school attendance and truancy. the local authority's formal EPN case record; payment, withdrawal and prosecution records.	Under normal circumstances any information like this would be included on the general pupil file if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.1.21	Secondary school places - all records relating to the allocation of secondary school places	Retain from year records created for 1 year.	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.22	Successful school admissions applications	Retain for 1 year from date of admission	School Admissions Appeals Code 2022	Yes	Secure disposal
SRS.7.1.23	Supplementary information form including additional information such as religion, medical conditions supplied as part of the admissions process	As the corresponding admission record		Yes	Secure disposal
SRS.7.1.24	Unsuccessful school admission applications (where an appeal is made)	Retain for 1 year from the resolution of the case	School Admissions Appeals Code 2022	Yes	Secure disposal

[18] For a penalty notice the decision to prosecute rests solely with the Local Authority as the independent prosecuting authority, it is not necessary for the school to duplicate the information regarding Education Penalty Notices (EPN). The school may be responsible for the initial referral and will have to inform any parents/carers or guardians who have not contacted the school of the absence of a child on a particular day and a record may be held on the pupil file of the child with any letters issued and records of attendance and absences to evidence referral for the EPN, but would not need to keep records of payments made, dates the EPN withdrawal and ground or prosecution etc.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.1.25	Unsuccessful school admission applications (where no appeal is made)	Retain for 1 year from the start of school term	School Admissions Appeals Code 2022	Yes	Secure disposal

7.2 Pupil's Education Record

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.0	Advice and information provided to parents regarding educational needs	Retain for 25 years from the pupil's date of birth	Education Act 1996 - Special Educational Needs and Disability Act 2001 and Families Act 2014 Part 3 Section 32 Information and advice	Yes	Secure disposal unless the document is subject to a legal hold
SRS.7.2.1	All records relating to Elective Home Education to monitor the suitability and efficiency of education to children and young people for the purpose of being educated at home including where they have been removed from a school roll.	Retain for 25 years from the pupil's date of birth		Yes	Secure disposal
SRS.7.2.2	All records relating to the Ethnic Diversity Service - Pupils to provide specialist teachers and bilingual teaching assistants to work in nurseries, primary and secondary schools in Stockport	Retain from date of birth for 25 years.		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.3	All records relating to the provision of educational support to children who are in hospital	Under normal circumstances any information like this would be included on the general pupil file if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.4	Alternative provision of education - all records relating to the alternative provision of education for pupils who cannot attend mainstream schools - non pupil records	Retain for 25 years from the pupil's date of birth		Yes	Secure disposal
SRS.7.2.5	Alternative provision of education - all records relating to the alternative provision of education for pupils who cannot attend mainstream schools - pupil records	Retain from date of birth of pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.6	Any other records created in the course of contact with pupils	Current year plus 3 years	Review at the end of 3 years and retain with pupil file if necessary	Potential	Secure disposal
SRS.7.2.7	Behaviour development - all records relating to the provision of educational psychology services	Under normal circumstances this information should be included on the main pupil file but if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.8	Careers advice - records relating to the management of processes required to provide careers advice to school pupils and client records relating to careers advice given to school pupils 13-19	Retain from date process changes for 3 years, for client records retain from year records created for 3 years.	Review at the end of 3 years and retain with pupil file if necessary	Potential	Secure disposal
SRS.7.2.9	Children missing from school - all records relating to children missing from school ensure parents and schools abide by legislation in relation to school attendance.	Retain from date of birth plus 25 years		Yes	Secure disposal
SRS.7.2.10	Education Penalty Notices - school referral, warning and attendance evidence	The initial referral can be kept on Pupil File for 2 years from end of academic year.	Absence data will be captured on attendance returns	Yes	Secure Disposal
SRS.7.2.11	Educational support for looked after children - all records relating to the provision of educational support for looked after children	Under normal circumstances this would be included on the social services case file, if not then retain from date of birth for 75 years.	Arrangements for the Placement of Children (General) Regulations 1991	Yes	Secure Disposal
SRS.7.2.12	Home school agreement all records relating to the creation and management of Home School Agreements	Retain from creation of agreement until pupil leaves the school.		Yes	Secure disposal
SRS.7.2.13	Home schooling - all records relating to the management of pupils schooled at home	Retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.14	Home to School Transport Appeals - records relating to Home to School Transport Appeals	Retain from date of birth of child for 25 years. Home to school transport (ineligible applicants) retain from date of birth of child for 18 years		Yes	Secure disposal
SRS.7.2.16	Intimate Care Records [19]	Retained for 6 years from date record created	Early Years Foundation Stage Statutory Framework	Yes	Secure disposal
SRS.7.2.17	Language and cultural support in school - all records relating to language and cultural support in schools	Under normal circumstances any information like this would be included on the general pupil file if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure Disposal
SRS.7.2.18	Parenting contract - all records relating to the development and implementation of parenting contracts	Retain from date of birth of pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

[19] The Early Years Foundation Stage Statutory Framework provides that (3.80) - Records relating to individual children must be retained for a reasonable period of time after they have left the provision and has a footnote that individual providers should determine how long to retain records relating to individual children.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.19	Permanently excluded students - all records relating to Permanently excluded students, PRU placements, complex admissions, and activity under the Fair Access Protocol and to manage referrals to the multi-agency panel.	Retain from date of birth of pupil for 25 years.		Yes	Secure disposal
SRS.7.2.20	Protection from harassment - records relating to the process or individual records relating to the provision of advice and support given to those who feel that they are being harassed at home, in the workplace, in public, at school where the advice given is not actionable	Retain from year process changed, or the date advice given for 3 years.		Yes	Secure disposal
SRS.7.2.21	Protection from harassment - records relating to the provision of advice and support given to those who feel that they are being harassed at home, in the workplace, in public, at school where the advice given could be actionable	Retain from date advice given for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.22	Pupil files (Primary school) [20]	Retain whilst the child remains at the Primary School. In the case of school exclusions, it may be appropriate to transfer to Behaviour Service	The Education (Pupil Information) (England) Regulations 2005	Yes	Secure disposal

[20] File should be transferred to next educational provision. If these transferred digitally any hard copies can be shredded after 6 months If these are transferred digitally hard copies can be shredded after 6 months

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.23	Pupil files (Secondary school) [21]	Retain for 25 years from the pupil's date of birth	The Education (Pupil Information) (England) Regulations 2005	Yes	Secure disposal
SRS.7.2.24	Pupil Referral Unit - all records relating to Pupil Referral Units (PRU) - non pupil records	Retain from date records created for 6 years		Potential	Secure disposal
SRS.7.2.25	Pupil Referral Unit - all records relating to Pupil Referral Units (PRU) - pupil records	Retain from date of birth of pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.26	Records relating to educational welfare support relating to individual pupils	Retain from date of birth for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.27	Reports of physical intervention - all records relating to Reports of physical intervention or restraint of pupils by schools and to monitor such incidents.	Current year plus 6 years.		Yes	Secure disposal
SRS.7.2.28	Reports of racist incidents at schools - all records relating to reports of racist incidents at schools to monitor racist incidents at schools.	Current year plus 6 years.		Yes	Secure disposal
SRS.7.2.29	Safeguarding children - all records relating to Safeguarding children to investigate concerns around abuse or neglect of a child at risk, undertake child safeguarding learning reviews and undertake multi-agency audits of practice to improve the coordination of services.	Retain from date of birth of child for 75 years.		Yes	Secure disposal

[21] Transfer to another secondary school if required. In the case of exclusion, it may be appropriate to transfer the record to the Pupil Referral Unit. Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.30	School Nursing - all records created by the school nursing service	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.31	School Pupil Records - all records relating to school pupils	Retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.32	School's Behaviour Support Service - all records relating to School's Behaviour Support Service [22]	Date of birth plus 25 years		Yes	Secure disposal
SRS.7.2.33	Sensory Support Service - all records relating to the Sensory Support Service	Retain from date of birth for 25 years [23]	Records in relation to specialist intervention to babies, children and young people aged 0 to 25 years	Yes	Secure disposal
SRS.7.2.34	Signed receipts from Secondary Schools confirming receipt of the Pupil paper files	Current year plus 6 years		Potential	Secure disposal

[22] Records to assess if pupils meet the criteria for Behaviour Support Service involvement, to plan, track and monitor pupil progress and to provide information and support to parents, carers, and schools.

[23] Unless a child or young person is looked after in which case retain for 75 years.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.35	Supervised medication in school - all records relating to the supervision of medication administration in schools	Retain from date of birth of the pupil for 21 years and 4 months.	Limitation Act 1980 (Section 11)	Yes	Secure disposal
SRS.7.2.36	Support for gifted children -all records relating to the provision of support for gifted children	Under normal circumstances these records would be included on the individual pupil file if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.37	Support when leaving education - all records relating to the provision of support for young people when leaving education	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.38	Teenage pregnancy - all records relating to the provision of information and advice provided to support teenage parents	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.39	Transition between schools - all records relating to the provision of support to pupils when moving between schools [24]	Retain from date of birth of the pupil for 25 years.	Education (Pupil Information) (England) Regulations 2005 Schedule 2	Yes	Secure disposal

[24] Under normal circumstances this information should be included on the main pupil file but if not retain from date of birth of the pupil for 25 years. For records that may transferring to a new or secondary school only the information forming part of the common transfer file as detailed in the Schedule 2

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.2.40	Traveller children support - all records relating to the provision of teaching support for traveller children	Retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.44	Users of the music service - all records relating to Users of the Music Service to provide a music service to pupils in schools and to other partners, giving ensemble opportunities, tuition and to support grant funding applications.	6 years plus 1 for finance records, 25 years for educational visits		Yes	Secure disposal
SRS.7.2.45	Virtual School for Looked After Children (LAC) - all records relating to Virtual School for Looked After Children (LAC) to administer the virtual school, improving outcomes for LAC.	Relevant data is placed on the child's record and kept in line with LAC casefile retention (75 years).	All other data is retained from the date of birth of the pupil for 25 years.	Yes	Secure disposal
SRS.7.2.46	Work Experience Placements - all records relating to the allocation and management of work experience placements	Retain from date of work experience placement ends for 6 years. (Minimum recommendation.)	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.7.2.47	Pupil's educational record (Pupil files) - Deceased pupils (primary or secondary school)	Retain for 7 years from the date of death[25]	Limitation Act 1980 (Section 2)	Yes	Secure disposal

[25] Records may be retained for longer periods where necessary, for example in cases involving Special Educational Needs (SEN), safeguarding concerns, or legal considerations.

7.3 Child Protection

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.3.0	Child protection information - held in separate files	DOB of the child plus 25 years then review. [26]	Keeping children safe in education and Working Together to Safeguard Children[27]	Yes	Secure disposal – these records MUST be shredded
SRS.7.3.1	Child Protection information - held on pupil file	DOB of the child plus 25 years then review [28]	Keeping children safe in education and Working Together to Safeguard Children [27]	Yes	Secure disposal – these records MUST be shredded

[26] This retention period was agreed in consultation with the Safeguarding Children Group on the understanding that the principal copy of this information will be found on the Local Authority Social Services record

[27] Keeping children safe in education - Statutory guidance for schools and colleges on safeguarding children and safer recruitment and Working Together to Safeguard Children Statutory guidance on multi-agency working to help, support and protect children.

[28] 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.

7.4 Educational Welfare Support

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.4.0	Educational Welfare Support - all records relating to processes supporting the provision of educational welfare support	Retain from date processes change for 6 years.		Yes	Secure disposal
SRS.7.4.1	School's Learning Support Service - all records relating to School's Learning Support Service to assess if pupils meet the criteria for Learning Support Service involvement, plan, track and monitor pupil progress and provide information and support to parents, carers, and schools.	Date of birth plus 25 years		Yes	Secure disposal

7.5 Psychiatric, or Social Work Services

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.5.0	Psychological, psychiatric, or social work services - all records relating to psychological, psychiatric, or social work services (not including child protection) in schools	Under normal circumstances this information should be retained on the child's personal file otherwise retain from date of birth of child for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

7.6 Special Educational Needs and Disability (SEND)

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.6.0	Accessibility Strategy [29]	Closure plus 12 years unless legal action is pending	Equality Act 2010 Schedule 10 and Special Educational Needs and Disability Act 2001 Section 14	Yes	Secure disposal
SRS.7.6.1	Accessibility Strategy - Individual Pupils	Retain for 25 years from the pupil's date of birth - unless the document is subject to a legal hold	Education Act 1996 and Special Educational Needs and Disability Act 2001 Section 1	Yes	Secure disposal
SRS.7.6.2	Special Educational Needs and Disabilities files, reviews and Individual Education Health and Care Plan (EHCP) Proposed or amended EHCP [30]	Retain for 25 years from the pupil's date of birth unless the document is subject to a legal hold	Education Act 1996, Special Educational Needs, and Disability Act 2001 Section 1 and Special Educational Needs and Disability Regulations 2014	Yes	Secure disposal

[29] The Equality Act requires schools and the Local Authority to make reasonable adjustments to ensure that disabled pupils are not at a substantial disadvantage. Reasonable adjustments meet the statutory requirements when they act to prevent disabled pupils being placed at a substantial disadvantage, and when they enable pupils to participate in education and other benefits, facilities and services which the school provides.

[30] An EHCP must be reviewed at least once a year (or every six months for under-fives).

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.6.3	Special Educational Needs and Disability (SEND) – placements, assessments, and co-ordinated support plans [31]	Retain for 25 years from the pupil's date of birth - unless the document is subject to a legal hold	Education Act 1996, Special Educational Needs, and Disability Act 2001 Section 1 and Special Educational Needs and Disability Regulations 2014	Yes	Secure disposal
SRS.7.6.4	Special Educational Needs and Disability (SEND) records relating to individual support provided by the schools (Primary)	Retain for duration of attendance at school plus 12 months		Yes	Transfer to Secondary School
SRS.7.6.5	Special Educational Needs and Disability (SEND) records relating to individual support provided by the schools (Secondary)	Retain for 25 years from the pupil's date of birth	Education Act 1996, Special Educational Needs, and Disability Act 2001 Section 1 and Special Educational Needs and Disability (Part 3 Section 32 Information and advice) Regulations 2014	Yes	Secure disposal

[31] Under normal circumstances this information should be retained on the child's personal file otherwise retain from date of birth of child for 25 years. All records relating to the allocation of school places to children with special educational needs in mainstream schools, the management of special educational needs assessments and all records relating to the development and implementation of special needs coordinated support plans.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.7.6.6	Statement maintained under Section 324(1), Education Act 1996 and any amendments made to the statement.	Statement is valid until individual reaches 25 years unless the document is subject to a legal hold	Education Act 1996, Special Educational Needs, and Disability Act 2001 Section 1 and Special Educational Needs and Disability (Part 3 Section 32 Information and advice) Regulations 2014	Yes	Secure disposal

8. Curriculum and Extra Curriculum Activities

8.1 Statistics and Management

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.1.0	Curriculum returns	Current year plus 3 years		Yes	Secure disposal
SRS.8.1.1	Examination Results (Schools Copy)	Current year plus 6 years		Yes	Secure disposal
SRS.8.1.2	GCSE exam certificates [32]	Schools and colleges may destroy any unclaimed certificates securely after holding them for 12 months		Yes	Secure disposal
SRS.8.1.3	Integrated curriculum and financial planning (ICFP) [33]	Current year plus 6 years		No	Secure disposal
SRS.8.1.4	Internal examination results	Current year plus 5 years		Yes	Secure disposal

[32] There are no limits on the length of time on retaining GCSE exam certificates, as JCQ advise schools and colleges are only required to retain certificates for a period of 12 months after they are issued. This standard procedure for dealing with unclaimed certificates was implemented in 2007 by agreement by the awarding bodies. However, some educational establishments archive unclaimed certificates for a period five years from the date of issue and destroy once the retention period has expired. It is recommended that records are kept of all certificates destroyed for a further period of four years from the date of their destruction.

[33] Integrated Curriculum and Financial Planning (ICFP) - gov.uk. The ICFP is a management process that helps schools plan the best curriculum for pupils with the funding available using the data to create a 3- to 5-year plan.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.1.5	Published Admission Number (PAN) Reports	Current year plus 6 years	(Numbers of pupils that the school can admit into each relevant age group)	Yes	Secure disposal
SRS.8.1.6	SATs Examination Papers	Retain until the conclusion of the applicable review, validation, maladministration or appeal process, then securely dispose.	The examination papers should be kept until any appeals/validation process is complete	Yes	Secure disposal
SRS.8.1.7	SATs Results [34]	Date of birth plus 25 years		Yes	Secure disposal
SRS.8.1.8	School Resource Management Self-Assessment Checklist [35]	Current year plus 6 years		No	Secure disposal
SRS.8.1.9	Schools Financial Value Standard (SFVS) and assurance statement [36]	Current year plus 6 years	Schools Financial Value Standard - SFVS gov.uk	No	Secure disposal
SRS.8.1.10	Self-Evaluation Forms [37]	Current year plus 6 years		Yes	Secure disposal

[34] The SATS results should be recorded on the Pupil's educational file and will therefore be retained until the pupil reaches the age of 25 years. The school may wish to keep a composite record of all the whole year SATs results. These could be kept for current year plus 6 years to allow suitable comparison

[35] All academy trusts which have an open academy must complete the self-assessment checklist each year.

[36] Local-authority-maintained schools must submit the Schools Financial Value Standard (SFVS) to their local authority annually.

[37] School's monitoring and analysis of curriculum, teaching and learning, attainment and progress of pupils, pupils' behaviour, attendance and safety and the views of parents and pupils.

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.1.11	Value Added and Contextual Data to measure of the progress pupils made over a period of time.	Current year plus 6 years		Yes	Secure disposal

8.2 Implementation of the Curriculum

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.2.0	Class Record Books	Current year plus 1 year		Yes	Secure disposal
SRS.8.2.1	Curriculum and policy - Education consultations - all records relating to education consultations	Retain from date of consultation for 7 years.			Secure disposal
SRS.8.2.2	Curriculum and policy - Exclusion of school pupils - all records relating to the exclusion of school pupils (fixed term and permanent)	Under normal circumstances any information like this would be included on the general pupil file if not retain from date of birth of the pupil for 25 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.2.3	Extended schools - all records relating to the provision of extended schools' activities	Retain from year records created for 6 years. (Minimum recommendation.)	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.2.4	Instrumental tuition - all records relating to the provision of instrumental tuition in schools	Retain from end of contract for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.2.5	Mark Books	Current year plus 1 year		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.2.6	Musical instrument hire - all records relating to the administration of musical instrument hire schemes	Retain from date hire ceases for 6 years.	HMRC - Compliance Handbook Manual CH15400	Potential	Secure disposal
SRS.8.2.7	Musical instruments purchase scheme - all records relating to the administration of the musical instruments purchase scheme	Retain from year records created for 6 years.	HMRC - Compliance Handbook Manual CH15400	Potential	Secure disposal
SRS.8.2.8	Pupils' Work	Where possible pupils' work should be returned to the pupil at the end of the academic year	If this is not the school's policy, then current year plus 1 year	Yes	Secure disposal
SRS.8.2.9	Record of homework set	Current year plus 1 year		Yes	Secure disposal
SRS.8.2.10	Schemes of Work	Current year plus 1 year	Review these records at the end of each year and allocate a further retention period or disposal if required	Yes	Secure disposal
SRS.8.2.11	School Breakfast Clubs - all records relating to the provision of school breakfast clubs (including all records relating to food hygiene)	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.2.12	School Closures - all records relating to the provision of information relating to school closures	Retain from date information published until superseded	This will be a dynamic document, constantly updating.	Yes	Secure disposal
SRS.8.2.13	School Curriculum - all records relating to the development of school curriculums	Retain from date curriculum superseded for 6 years.		Yes	Secure disposal
SRS.8.2.14	School Holiday Schemes - records relating to children attending school holiday schemes	Retain from date of the play scheme for 6 years.	Limitation Act 1980 (Section 2)	Potential	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
		(Minimum recommendation.)			
SRS.8.2.15	School Session Times - all records relating to the development, implementation, and management of school session times	Retain from academic year records created for 6 years.		Potential	Secure disposal
SRS.8.2.16	School Term and Holiday Dates - all records relating to the creation and publication of school term and holiday dates	Retain from year records created for 1 year.		Potential	Secure disposal
SRS.8.2.17	Timetables	Current year plus 1 year		Potential	Secure disposal

8.3 Family Liaison and Home School Liaison

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.3.0	Contact data sheets	Current year then review if contact is no longer active then destroy		Yes	Secure disposal
SRS.8.3.1	Contact database entries	Current year then review if contact is no longer active then destroy		Yes	Secure disposal
SRS.8.3.2	Day Books	Current year plus 2 years		Yes	Secure disposal
SRS.8.3.3	Group Registers	Current year plus 2 years		Yes	Secure disposal
SRS.8.3.4	Referral forms	While the referral is current		Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.3.5	Reports for outside agencies - where the report has been included on the case file created by the outside agency	Whilst child is attending school and then destroy		Yes	Secure disposal

8.4 School Trips

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.4.0	Parental permission slips for school trips where there has been a major incident (e.g. involvement of emergency services, hospital admission, disease outbreak)	DOB of the pupil involved in the incident plus 25 years.	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	Yes	Secure disposal
SRS.8.4.1	Parental permission slips for school trips where there has not been a major incident	Conclusion of the trip		Yes	Secure disposal
SRS.8.4.2	Records created by schools to obtain approval to run an Educational Visit outside the Classroom - Primary and Secondary Schools	Date of visit plus 14 years	The Health and Safety at Work Act 1974. See also DfE Guidance - Health and safety: responsibilities and duties for schools	Yes	Secure disposal
SRS.8.4.3	School Advisory Visits - all records relating to school advisory visits	Retain for 3 years from date of visit.		Yes	Secure disposal
SRS.8.4.4	School Visits - all Parental Consent Forms where there has been a major incident	Retain for a minimum of 6 years from the result of the investigation.	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.4.5	School Visits - all records relating to the administration of school visits, including permission from the local authority, risk assessments, itineraries etc	Retain from date of the trip for 6 years. (Minimum recommendation.)	Limitation Act 1980 (Section 2)	Yes	Secure disposal

8.5 School Clubs And Activities

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.8.5.0	School Clubs And Activities - records relating to the processes to support the provision of school clubs and activities	Retain from date process changes for 6 years	Limitation Act 1980 (Section 2)	Yes	Secure disposal
SRS.8.5.1	School Clubs And Activities - records relating to the provision of school clubs and activities which refer to individual pupils	Retain from year records created for 6 years.	Limitation Act 1980 (Section 2)	Yes	Secure disposal

9. Central Government & Local Authority

9.1 Statutory returns for schools

This section covers records created in the course of interaction between Schools, Academies and the Local Authority And Central Government

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.9.1.0	Attendance Returns	Current year plus 1 year	Working together to improve school attendance - Statutory guidance for maintained schools, academies, independent schools and local authorities	Yes	Secure disposal

Ref.	Record Type	Retention Period	Statutory Provision/Notes	Data Protection Considerations	Disposal Action
SRS.9.1.1	Returns made to Central Government	Current year plus 6 years		Yes	Secure disposal
SRS.9.1.2	School Census Returns	Current year plus 6 years		Yes	Secure disposal
SRS.9.1.3	Secondary transfer sheets (Primary)	Current year plus 2 years		Yes	Secure disposal
SRS.9.1.4	Service Level Agreements	Until superseded			Secure disposal
SRS.9.1.5	Signed Paper Copies of the Census	Current year plus 6 years at the end of the calendar year that the record was created in then destroy.		Yes	Secure disposal
SRS.9.1.6	OFSTED Reports & Papers	Life of the report - replace former report with new inspection report	Review to see if further retention period required. Disposal		
SRS.9.1.7	Circulars and information from the Department of Education or Local Authority	Whilst required operationally	Review to see if further retention period required. Disposal	No	Secure disposal

Review

Version	Author	Policy approved by	Approval date	Review date	Changes made?
V1	IG Team	IG Team	04/11/2022	01/09/2023	New document
V2	IG Team	IG Team	15/07/2023	01/09/2024	Review and updates
V3	IG Team	IG Team	23/07/2024	01/09/2025	Review and updates
V4	IG Team	IG Team	07/03/2025	01/09/2026	Changes to formatting, review and updates
V5	IG Team	IG Team	26/08/2026	01/09/2027	Review and updates