



Data Retention Policy

Pupil Management

Basic file description	Statutory Provisions	Retention Period
Pupil admission data including Parent contact information- joins school		To end of period pupil at school - then becomes past pupil
Pupil admission data - does not join school		To end of academic year that pupil no longer in Rowan age range
Admissions register	ISI Education regulations	minimum 3 years
Pupil's Educational Record - reports, assessments, health & welfare information	The Education (Pupil Information) (England) Regulations 2005 Limitation Act 1980	A pupil reference and key assessment data is passed to their next school. All other pupil data except core alumni record to be removed in year pupil reaches 25.
Assessment & other internal performance records		6 years after leaving the school
Child protection information (Held in separate files)	KCSIE 2016	DOB + 25 years
Attendance Registers	DfE / ISI Regulations	3 years
Correspondence relating to absence	Education Act 1996	3 years
All Special Education Needs files including reviews, IEPs, statements	Limitation Act 1980	Date of Birth of the pupil +25 years

Past Pupils

Basic file description	Statutory Provisions	Retention Period
Past Pupil core record - name date of birth, date of joining school, previous school, date of leaving school, year group on leaving, next school		Indefinitely
Past Pupil contact information		annual consent to confirm up to date
Past Parent contact information - pupil under 13.		annual consent to confirm up to date



Data Retention Policy

Staff Management

Basic file description	Statutory Provisions	Retention Period
Records leading to appointment of staff - unsuccessful	Equality Act	date of appointment + 6 months
Records except DBS leading to appointment of staff		Added to staff personal file
Pre-employment SCR checks supporting documentation	DBS Update Service Employer Guide June 2014: Keeping Children Safe in education. July 2015 (Statutory Guidance from Dept of Education	Destroy DBS after 6 months but keep supporting documentation on personnel file
Staff Personal file	Limitations Act 1980	
Payroll Records		Current +6 years
Performance / Appraisal Records		Termination of Employment +6 years
Discipline & Grievances		
Allegation of a child protection nature against a member of staff including where the allegation is unfounded	“Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	Until the person’s normal retirement age or 10 years from allegation whichever is the longer then REVIEW. Note allegations which are found to be malicious should be removed from personnel files.
Disciplinary Proceedings - oral warning, written warning - level 1, written warning - level 2, final warning, case not found		Date of warning +6 months Date of warning +6 months date of warning +12 months date of warning +18 months Dispose of at conclusion of case
Absence Records		Termination of Employment +6 years
Professional Development Plans		Life of the plan + 6 years



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Non Employee Management

Basic file description	Statutory Provisions	Retention Period
Records leading to engagement of non employees, Peris, Governors, Volunteers - unsuccessful	Equality Act	date of appointment + 6 months
Records except DBS leading to appointment of non employees to have regular involvement at Rowan -		up to end of year of involvement
SCR checks supporting documentation	DBS Update Service Employer Guide June 2014: Keeping Children Safe in education. July 2015	Destroy DBS after 6 months but keep supporting documentation on personnel file
Personal file	Limitations Act 1980	Termination of Engagement with Rowan +6 years
Child Protection allegations		
Allegation of a child protection nature against a person involved at Rowan including where the allegation is unfounded	“Working together to safeguard children. A guide to inter-agency working to safeguard and promote the welfare of children March 2015”	Until the person’s normal retirement age or 10 years from allegation whichever is the longer then REVIEW. Note allegations which are found to be malicious should be removed from personnel files.

Curriculum Management

Basic file description	Statutory Provisions	Retention Period
Assessments (internal) results		current year plus 6
Examinations (external) results		current year plus 6
Examinations & assessment papers		current year +1 year
Curriculum Medium Term Plans		current year +3
Self- evaluation forms		current year + 3
Schemes of Work, timetables, mark books, records of homework set		current year +1 year
Pupils' work		Should returned to pupil or store current year +1



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Extra Curricula Management

Basic file description	Statutory Provisions	Retention Period
Educational Trips and Visits - details and risk assessments	DfE guidance on educational visits	Date of visit plus 14 years
Parental permission slips		End of academic year, unless major incident
Where there has been a major incident all information pertaining to the trip	Limited Act 1980 (Section 2)	DOB of pupil +25 years
Off-site Registers		Conclusion of trip, unless major incident
Transport Registers		End of academic year

Financial Management

Basic file description	Statutory Provisions	Retention Period
Budget - preparation		current plus 3 years
Management accounts (NB statutory accounts records maintained by Head Office)		current plus 3 years
Asset registers of furniture & equipment		current plus 6 years
Purchasing - orders, receipts, invoices		current plus 6 years
Fee billing & supporting documents		current plus 6 years
Bank statements & supporting documents		current plus 6 years
Records of collection & banking of cash		current plus 6 years
Petty cash records		current plus 6 years
Records to support debt collection		current plus 6 years
Assisted Place & Bursary applications - successful		period of fee support granted
Assisted Place & Bursary applications - un successful		year of application
Contracts & supporting documentation		period of contract plus 6 years
Leases of equipment		term of lease plus 6 years



Data Retention Policy

School Operational Management

Basic file description	Statutory Provisions	Retention Period
Visitors book & sign in sheets		Current plus 6 years
Health & Safety Risk Assessments		current plus 3 years
Serious Accident records - Adult		date of incident plus 12 years
Serious Accident records - Child		DOB plus 25 years
Minor accident/incidents		current plus 1 year
Incidents under Control of Substances Hazardous to Health (COSHH)	COSHH regulations 2002	current plus 40 years
Records of Medicines administered		DOB plus 25 years
Asbestos surveys & monitoring	Asbestos at Work regulations 2012	last action plus 40 years
Radiation monitoring (if applicable)		last action plus 50 years
Fire risk assessment and log books		current plus 6 years
Records of any lettings of the premises		current plus 6 years
Maintenance & inspection records		current plus 6 years
LGB and Health & Safety committee minutes		Current plus 6 years
Training records for Health & Safety and Safeguarding Children		Current plus 6 years
Creation & Distribution of newsletters to staff & parents		indefinite - historic record