

At Allanson Street, we belong, believe, aspire and achieve

Mission Statement

At Allanson Street Primary School, we give every child the life chances they deserve regardless of their starting point or the obstacles they may encounter.

Children leave us well equipped with the knowledge, skills and values needed to become happy, confident, productive citizens ready and willing to make a positive contribution to the world.

Respect

Kindness

Resilience

Aspiration

Integrity

Pride

Courage

Independence



EDUCATION RECORDS RETENTION SCHEDULE

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1. Pupil Records

| PR | Basic file description | Justification | Retention Period |
|-------------|---|--|--|
| PR 1 | Admissions and Attendance | | |
| PR 1.1 | Admission Registers | Common Practice | Permanent |
| PR 1.2 | Records relating to the admissions process if the admission is successful | Common Practice | Admission + 1 year |
| PR 1.3 | Records relating to the admissions process if the appeal is unsuccessful | The School Admission Appeals Code issued under Section 84 of the School Standards and Framework Act 1998 | Conclusion of the appeal process + 1 year |
| PR 1.4 | Attendance registers | Common Practice | Date of register + 3 years |
| PR 1.5 | Parent declaration form for nursery education funding | Common Practice | Date funding ceases + 6 years |
| PR 2 | Pupil Educational Record | | |
| PR 2.1 | Pupil Files – Primary School | Education (Pupil Information) (England) Regulations 2005 (SI 2005/1437) | Retain for the time which the pupil remains at the Primary School then transfer to the Secondary School (or other Primary School) when the child leaves the school |
| PR 2.2 | Pupil Files Secondary | Education (Pupil Information) (England) Regulations 2005 (SI 2005/1437) | DOB of the pupil + 25 years |
| PR 2.3 | Examination results - Public | Common Practice | Year of examinations + 6 years |
| PR 2.4 | Examination results - Internal examination results | Common Practice | Current year + 5 years |
| PR 2.5 | Images held of pupils together with any consents and permissions to publish | Common Practice | All records relating to the image should be retained for the period that the consent is in place. |
| PR 3 | Special Educational Needs | | |
| PR 3.1 | Special Educational Needs files, reviews and Individual Education Plans | Common Practice | DOB of the pupil + 25 years Unless legal action is pending |
| PR 3.2 | Statement maintained under The Education Act 1996 - Section 324 | Common Practice | DOB + 25 years Unless legal action is pending |
| PR 3.3 | Proposed statement or amended statement | Special Educational Needs and Disability Act 2001 Section 1 | DOB + 25 years Unless legal action is pending |
| PR 3.4 | Advice and information to parents regarding educational needs | Special Educational Needs and Disability Act 2001 Section 2 (now repealed) | Closure + 12 years Unless legal action is pending |

2. School Trips and Extra Curricular Activities

| ST | Basic file description | Statutory Provisions | Retention Period |
|-------------|---|----------------------|--|
| ST 1 | Trips | | |
| ST 1.1 | Parental permission slips for school trips – where there has been no major incident | Common Practice | Conclusion of the trip |
| ST 1.2 | Parental permission slips for school trips – where there has been a major incident | Common Practice | DOB of the pupil involved in the incident + 25 years The permission slips for all pupils on the trip need to be retained in these circumstances |

3. Teaching and Curriculum

| SMT | Basic file description | Statutory Provisions | Retention Period |
|--------------|---|----------------------|---|
| SMT 1 | Senior Management Team | | |
| SMT 1.1 | Log-Books | Common Practice | Date of last entry in the book + 6 years |
| SMT 1.2 | Minutes of the Senior Management Team | Common Practice | Date of meeting + 5 years |
| SMT 1.3 | Reports made by the Head Teacher or the management team | Common Practice | Date of report + 3 years |
| SMT 1.4 | Records created by Head Teachers, Deputy Head Teachers, Heads of Year and other members of staff with administrative responsibilities | Common Practice | Current academic year + 6 years |
| SMT 1.5 | School development plans | Common Practice | Expiry of plan + 6 years then review |
| SMT 1.6 | Professional development plans | Common Practice | Expiry of plan + 6 years |
| SMT 2 | Curriculum Management | | |
| SMT 2.1 | Timetable | Common Practice | Current year then review |
| SMT 2.2 | Curriculum development | Common Practice | Current year + 6 years |
| SMT 2.3 | Curriculum returns | Common Practice | Current year + 3 years |
| SMT 2.4 | School syllabus | Common Practice | Current year then review |
| SMT 2.5 | Schemes of work | | Current year then review with a view to destroy |
| SMT 2.6 | Class record books | | Current year then review with a view to destroy |
| SMT 2.7 | Mark Books | | Current year then review with a view to destroy |

| SMT | Basic file description | Statutory Provisions | Retention Period |
|---------|------------------------|----------------------|---|
| SMT 2.8 | Record of homework set | | Current year then review with a view to destroy |
| SMT 2.9 | Pupils' work | | Current year then review with a view to destroy |

4. Staff / Health and Safety / Payroll and Financial Records

| HR | Basic file description | Statutory Provisions | Retention Period |
|-------------|--|--|---|
| HR 1 | Personnel Management | | |
| HR 1.1 | Staff Personnel files | Limitation Act 1980 | Termination + 6 years |
| HR 1.2 | Interview notes and recruitment records | Justification based on time limits issue for issuing proceedings in the employment tribunal | Date of interview + 9 months |
| HR 1.3 | Pre-employment vetting information (including DBS checks) | DBS guidelines | Date of check + 6 months |
| HR 1.4 | Right to Work in the UK checks | https://www.gov.uk/check-job-applicant-right-to-work | Termination of employment + 2 years |
| HR 1.5 | Written particulars of employment. Contracts of employment or other contracts. Documented changes to terms and conditions. | Limitation Act 1980 | Termination + 6 years |
| HR 1.6 | Disciplinary and grievance records | Limitation Act 1980 | Termination + 6 years |
| HR 1.7 | Annual appraisal or assessment records | Common Practice | Current year + 5 years |
| HR 1.8 | Images held of members of staff together with any consents and permissions to publish | Common Practice | All records relating to the image should be retained for the life of the image. The length of time the image is to be retained should be included in the consent. |
| HR 2 | Health and Safety | | |
| HR 2.1 | Accessibility Plans | Equality Act 2010 (See s.88 and schedule 10) | Current year + 6 years |
| HR 2.2 | Records relating to accident/injury at work | The Management of Health & Safety at Work Regulations 1999 Health and Safety at Work Act 1974 | Date of incident + 12 years ¹ |
| HR 2.3 | Accident Reporting – Children | Limitation Act 1980 | Date of birth + 22 years where the injured person is a minor at the time of the accident |
| HR 2.4 | Accident Reporting – Adults | Social Security (Claims and Payments) Regulations 1979 Regulation 25. Social Security Administration Act 1992 Section 8. Limitation Act 1980 | Date of the accident + 4 years where the injured person is an adult at the time of the accident; |
| HR 2.5 | Risk Assessments | The Management of Health & Safety at Work Regulations 1999 Health and Safety at Work Act 1974 | Current year + 3 years |
| HR 2.6 | COSHH Risk Assessments | Control of Substances Hazardous to Health (COSHH) Regulations 2002 | Date of creation + 40 years |
| HR 2.7 | Incident reports | | Current year + 20 years |
| HR 2.8 | Process of monitoring areas where employees and persons are likely to have become in contact with asbestos | Control of Asbestos Regulations 2012 | Last action + 40 years |
| HR 2.9 | Process of monitoring of areas where employees and persons are likely to have come in contact with radiation | Ionising Radiations Regulations 2017 | Last action + 50 years |
| HR 2.10 | Fire Safety Records including Fire Safety Audits | Regulatory Reform (Fire Safety) Order 2005 | Current year + 6 years |
| HR 2.11 | Fire Risk Assessments | Regulatory Reform (Fire Safety) Order 2005 | Date the fire risk assessment expires + 6 years |
| HR 2.12 | Fire Drill records | Regulatory Reform (Fire Safety) Order 2005 | Date of fire drill + 6 years |
| HR 3 | Payroll and Pensions | | |
| HR 3.1 | Records relating to the management of the payroll | HMRC - Compliance Handbook Manual CH15400 | Financial year to which the payroll is run + 6 years |
| HR 3.2 | Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995 | Retirement Benefits Schemes (Information Powers) Regulations 1995 | Current year + 6 years |
| HR 3.3 | Salary cards | | Last date of employment + 85 years |
| HR 3.4 | Maternity pay records | Statutory Maternity Pay (General) Regulations 1986 (SI 1986/1960), revised 1999 (SI 1999/567) | Current year + 3yrs |
| HR 3.5 | Timesheets, sick pay | | Current year + 6 years |
| HR 4 | School Meals | | |
| HR 4.1 | Dinner Register | | Current year + 3 years |
| HR 4.2 | School Meals Summary Sheets | | Current year + 3 years |
| HR 4.3 | Free school meals registers | HMRC - Compliance Handbook Manual CH15400 | Current year + 6 years |
| HR 5 | General Administration | | |
| HR 5.1 | School brochure/prospectus | | Current year + 3 years |
| HR 5.2 | General file series or correspondence files | | Current year + 5 years |

| HR | Basic file description | Statutory Provisions | Retention Period |
|--------|---|----------------------|--|
| HR 5.3 | Circulars (staff/parents/pupils) | | Current year + 1 year |
| HR 5.4 | Newsletters, ephemera | | Current year + 1 year |
| HR 5.5 | Visitors book | | Current year + 2 years |
| HR 5.6 | Images held of pupils together with any consents and permissions to publish | | All records relating to the image should be retained for the life of the image. The length of time the image is to be retained should be included on the privacy statement |
| HR 5.7 | Records relating to the management of PTA/Old Pupils Associations | | Current year + 6 years |
| HR 5.8 | Records relating to the management of data subject access requests | | Current year + 3 years |
| HR 5.9 | Records relating to the management of freedom of information requests | | Current year + 3 years |

5. Safeguarding

| SG | Basic file description | Statutory Provisions | Retention Period |
|-------------|---|------------------------------|--|
| SG 1 | | | |
| SG 1.1 | Child protection files (primary) | Published statutory guidance | Transfer to next school |
| SG 1.2 | Child protection files (secondary) | Published statutory guidance | DOB + 25 years |
| SG 1.3 | Allegations of a child protection nature made against a member of staff (including unfounded allegations) | Common Practice | Retain until the normal retirement age for the member of staff or for 10 years (whichever is the longer) |

6. Central Government and Local Authority

| CG | Basic file description | Statutory Provisions | Retention Period |
|-------------|-------------------------------------|----------------------|--|
| CG 1 | Local Authority | | |
| CG 1.1 | Secondary transfer sheets (Primary) | Common Practice | Current year + 2 years |
| CG 1.2 | Attendance returns | Common Practice | Current year + 1 year |
| CG 1.3 | Circulars from LA | Common Practice | Whilst required operationally then review to see whether a further retention period is required |
| CG2 | Central Government | | |
| CG 2.1 | OFSTED reports and papers | Common Practice | Replace former report with any new inspection report then review to see whether a further retention period is required |
| CG 2.2 | Returns | Common Practice | Current year + 6 years |
| CG 2.3 | Circulars from DfE | Common Practice | Whilst operationally required then review to see whether a further retention period is required |

7. Governing Body Records

| GB | Basic file description | Justification | Retention Period |
|-------------|---|---|---|
| GB 1 | Management of Governing Body | | |
| GB 1.1 | Instruments of Government | Common practice | Permanent |
| GB 1.2 | Trusts and Endowments | Common practice | Permanent |
| GB 1.3 | Records relating to the election of parent and staff governors not appointed by the governors | To address any challenge to the election process | Date of election + 6 months |
| GB 1.4 | Records relating to the appointment of co-opted governors | Common practice | Provided that the decision has been recorded in the minutes the records relating to the appointment can be destroyed once the co-opted governor has finished their term of office |
| GB 1.5 | Records relating to the election of chair and vice chair | To address any challenge to the election process | Once the decision has been recorded in the minutes, the records relating to the election should be destroyed after 6 months. |
| GB 1.6 | Agendas – Principal copy | The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 (see Regulation 15) | Permanent |
| GB 1.7 | Minutes - Principal set (signed) | The School Governance (Roles, Procedures and Allowances) (England) Regulations 2013 (see Regulation 15) | Permanent |
| GB 1.8 | All records relating to the conversion of schools to Academy status | Common Practice | Permanent |
| GB 1.9 | Records relating to complaints made to and investigated by the Governing Body | Management of legal challenge | Date of resolution of complaint + 6 years then review for further retention in the case of contentious disputes |

| GB | Basic file description | Justification | Retention Period |
|-------------|--|-------------------------------|--|
| GB 1.10 | Correspondence sent and received by the Governing Body | Management of legal challenge | Current year + 6 years |
| GB 2 | Management of Governors | | |
| GB 2.1 | Records relating to the appointment of a clerk to the Governing Body | Common Practice | Date appointment as clerk ceases + 6 years |
| GB 2.2 | Records relating to the terms of office of serving governors including evidence of appointment | Common Practice | PERMANENT |
| GB 2.3 | Records relating to Governor Declaration against disqualification criteria | Common Practice | Until the Governor steps down |
| GB 2.4 | Register of Business Interests | Common Practice | PERMANENT |
| GB 2.5 | Records relating to the training required and received by Governors | Common Practice | Until the Governor steps down |
| GB 2.6 | Records relating to the induction programme for new governors | Common Practice | Until the Governor steps down |
| GB 2.7 | Records relating to DBS checks carried out on clerk and members of the governing body | Common Practice | Date of DBS check + 6 months |

