



Coundon Primary School
Together Everyone Achieves More



Records Management Policy

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Version	Date	Description of changes and person/organisation responsible
1.0	16/05/2019	Document updated, formatted and uploaded to portal (SchoolPro TLC)
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3.0	08/10/25	Reference to IRMS Toolkit (2019) in Section 3 has been removed and replaced with reference to SchoolPro Records Management Schedule V.1

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1. Introduction

Coundon Primary School recognises that by efficiently managing its records, it will be able to comply with its legal and regulatory obligations and to contribute to the effective overall management of the institution. Records provide evidence for protecting the legal rights and interests of the school, and provide evidence for demonstrating performance and accountability. This document provides the policy framework through which this effective management can be achieved and audited. It covers:

- Scope
- Responsibilities
- Relationships with existing policies

2. Scope

This policy applies to all records created, received or maintained by staff of the school in the course of carrying out its functions.

Records are defined as all those documents which facilitate the business carried out by the school and which are thereafter retained (for a set period) to provide evidence of its transactions or activities. These records may be created, received or maintained in hard copy or electronically.

A small percentage of the school's records will be selected for permanent preservation as part of the institution's archives and for historical research. This should be done in liaison with the County Archives Service.

3. Responsibilities

Coundon Primary School has a corporate responsibility to maintain its records and record keeping systems in accordance with the regulatory environment. The person with overall responsibility for this policy is the Head of the School.

The School Business Manager s responsible for records management in the school, will give guidance for good records management practice and will promote compliance with this policy so that information will be retrieved easily, appropriately and in a timely way. The School Business Manager will also monitor compliance with this policy by surveying at least annually to check if records are stored securely and can be accessed appropriately.

Individual staff and employees must ensure that records for which they are responsible are accurate, and are maintained and disposed of in accordance with the school's records management guidelines. The school follows the SchoolPro Records Management Schedule V.1 which is attached as an appendix document.

4. Relationship with Existing Policies

This policy has been drawn up within the context of the school's Freedom of Information Policy, Data Protection Policy and with other legislation or regulations (including audit, equal opportunities and ethics) affecting the school.

About the Records Management Schedule (RMS)

This Records Management Schedule has been developed to help schools and trusts manage information consistently, securely and in line with UK data protection and freedom of information requirements. It is designed as a practical reference tool for headteachers, school business managers, data protection leads, Governors, central MAT staff, and Trustees when creating, using, storing, reviewing and securely disposing of records.

Purpose

- To set out retention periods and end-of-life actions (e.g. review, archive, secure disposal) for key categories of school records.
- To provide a clear audit trail that supports compliance with the UK General Data Protection Regulation (UK GDPR), the Data Protection Act 2018, and the Freedom of Information Act 2000 (including the Section 46 Code of Practice on Records Management).
- To help schools demonstrate accountability for personal data and effective use of resources by avoiding unnecessary storage.

Sources and Standards

The RMS draws on a wide range of recognised references, including but not limited to:

- Information and Records Management Society (IRMS) Toolkit for Schools and associated retention schedule.
- Department for Education (DfE) statutory guidance (e.g. Keeping Children Safe in Education, Working Together to Safeguard Children).
- Relevant UK legislation and statutory instruments, such as the Education (Pupil Information) (England) Regulations 2005, Limitation Act 1980, Companies Act 2006 and employment, tax and financial regulations.
- Guidance from the Information Commissioner's Office (ICO), particularly around the storage limitation principle and records of processing activities.
- Other government and professional body publications where appropriate.

How to Use the RMS

Records are grouped by functional area (e.g. Governing Body, School Management, Pupil Management, Curriculum, Finance/HR).

For each record type the schedule shows the recommended retention period, the statutory or best-practice basis, and the required action at the end of that period.

Individual tabs can be searched using the 'Find' function in Excel to navigate straight to specific records.

Where a legal obligation is under review or subject to specific conditions (for example the Independent Inquiry into Child Sexual Abuse (IICSA) moratorium), the RMS highlights this.

Responsibilities and Review

The RMS is guidance rather than a statutory standard, and local circumstances or legal advice may require variation. We have identified where statutory timescales do apply and schools or MATs shouldn't reduce retention periods below those periods.

Schools and trusts should ensure the schedule is approved by senior leadership/governing body/trustees and integrated with policies on data protection,

freedom of information, and information security.

The RMS should be reviewed at least annually, or sooner if legislation, DfE guidance, or IRMS recommendations change.

	Record Category	Record Description	Retention Period	Location	Final Disposition	Legal Basis/Statutory Provision	Sensitivity	Notes
1	Admissions Process							
1.1								
1.1.1		All records relating to the creation and implementation of the school's Admissions Policy	Life of the policy + 7 years The retention period refers to the 7 preceding years		SECURE DISPOSAL	Regulation 2 of the School Admissions (England) Regulations 2024		School Admissions Code Statutory guidance for admissions authorities, governing bodies, local authorities, school admissions and admissions appeals issued September 2021
1.1.2		Admissions - if admission is successful	6 Years from the admissions date		SECURE DISPOSAL	Regulation 2 of the School Admissions (England) Regulations 2024		
1.1.3		Admissions - if the appeal is unsuccessful	Resolution of case + 1 year		SECURE DISPOSAL	School Admissions (Appeal Regulations) (England) Regulations 2024		School Admissions Code Statutory guidance for admissions authorities, governing bodies, local authorities, school admissions and admissions appeals issued September 2021
1.1.4		Register of admissions	Every entry in the register must be preserved for a period of 6 years after the date at which the entry was made. If the register is kept on paper, it must be preserved for 6 years after the end of the school year to which it relates.		REVIEW Schools may wish to consider keeping the admissions register permanently, as they will need to refer to it from past pupils to confirm the dates they attended the school	School Admissions (Appeal Regulations) (England) Regulations 2024		
1.1.5		Admissions - Secondary Schools (GCSEs)	Current year + 1 year		SECURE DISPOSAL			
1.1.6		Proof of address supplied by parents as part of the admissions process	Current year + 1 year		SECURE DISPOSAL	School Admissions (Appeal Regulations) (England) Regulations 2024		School Admissions Code Statutory guidance for admissions authorities, governing bodies, local authorities, school admissions and admissions appeals issued September 2021
1.1.7		Supplementary information form; Supplementary information form with successful admissions	This information should be added to the students file		SECURE DISPOSAL At year pupil file	School Admissions (Appeal Regulations) (England) Regulations 2024		
1.1.8		Supplementary information form; Supplementary information form with unsuccessful admissions	Until appeals process has been completed		SECURE DISPOSAL	School Admissions (Appeal Regulations) (England) Regulations 2024		
1.2	Pupil's Educational Record							
1.2.1		Please note that any record containing pupil information may be subject to retention requirements. Records should implement any instruction which has been received from RCEA, by the Education (Pupil Information) (England) Regulations 2005. PRIMARY	Periods when the child remains at the primary school		The file should follow the pupil when they leave the primary school. This will include: > To a secondary school > To a pupil referral unit > If a pupil is referred to a secondary school, the file should be returned to the LA to be retained for the statutory retention period. > If the pupil transfers to an independent school, or home education, the file should be retained by the school/primary, the authority where the file should be stored for the remainder of its statutory retention.	The Education (Pupil Information) (England) Regulations 2005 & 2006, No. 1621		
1.2.2		Pupil's Educational Record required by the Education (Pupil Information) (England) Regulations 2005. SECONDARY	Date of birth + 28 years		REVIEW/SECURE DISPOSAL	Education Act 1995, 2011, 2024, 2025		Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.2.3		Examination Results Pupil Copies: Public	This information should be added to the pupil file		SECURE DISPOSAL At per pupil file			Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.2.4		Examination Results Pupil Copies: Internal	This information should be added to the pupil file		SECURE DISPOSAL At per pupil file			Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.2.5		Child protection information held on pupil file	If any records relating to child protection issues are placed on the pupil file, it should be in a sealed envelope and retained for a minimum period of time as the pupil file.		SECURE DISPOSAL These records must be stored	Keeping Children Safe in Education, 2024		Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.2.6		Child protection information held in a separate file	Date of birth of the child + 28 years If the file relates to child sexual abuse, retain until the child's 21st birthday.		SECURE DISPOSAL These records must be stored	Keeping Children Safe in Education, 2024		Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.3	Attendance							
1.3.1		Attendance Registers	Every entry in the attendance register must be preserved for a period of 6 years after the date on which the entry was made. Where a child stops attending the school, the register is to be preserved for 6 years after the end of the school year to which it relates.		SECURE DISPOSAL	School Admissions (Appeal Regulations) (England) Regulations 2024		Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued
1.3.2		Correspondence relating to any absence (authorised or unauthorised)	Current academic year + 3 years		SECURE DISPOSAL	Education Act 1995, Section 7		Section 2 of the Education Act 1980: Time limit for actions founded on tort, negligence or breach of contract brought after the expiration of 6 years from the date on which the cause of action accrued

[illegible]

2.4.2 Parent, Teacher, Association and Child Fighting Association	Records relating to the creation and maintenance of the Child Protection Association and/or Child Fight Association	Yes					Current year + 6 years from review	SECURE DISPOSAL	New Promise				
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Record Category	Record Description	Personal Information Use Drop Down Menu	Department Use Drop Down Menu for List of Departments	Format Use Drop Down Menu for List of Formats	Location Use Drop Down Menu for List of Locations	Retention Period	Trigger Event	Final Disposition	Legal Basis/Statutory Provision	Sensitivity (Use drop down menu for categories)	Notes
3.1	Head Teacher and Senior Management										
3.1.1	Log books of activity in the school maintained by the Head Teacher	Maybe				Date of last entry + minimum of 6 years, this review is set if to be kept permanently.	Date the log book is closed or last entry is made	These log books could have historical value and should be retained for the benefit of the school and offered to the Great Archives Service if appropriate.	Best Practice		
3.1.2	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies.	Maybe				Date of the meeting + 3 years. Review the policy to ensure it is appropriate to the significant reason to retain them (destroyable notes)		SECURE DISPOSAL	Best Practice		Unless there is a specific reason to retain the records e.g. legal, these records can be destroyed.
3.1.3	Reports created by the Head Teacher or the Management Team	Maybe				Date of the report + a minimum of 3 years. Review annually for as relevant to the significant reason to retain them (destroyable notes)		SECURE DISPOSAL	Best Practice		Unless there is a specific reason to retain the records e.g. legal, these records can be destroyed.
3.1.4	Materials created by head teacher/ deputy head, board of governors and other members of staff with administrative responsibilities which do not fall under correspondence created by head teacher, deputy head teacher, heads of year and other members of staff with administrative responsibilities.	Maybe				Current academic year + 6 years then review annually (or as requested) if no significant reason to retain them (destroyable notes)		SECURE DISPOSAL	Best Practice		Unless there is a specific reason to retain the records e.g. legal, these records can be destroyed.
3.1.5	Professional Development Plans	Yes				Current year + 3 years	From the date of the correspondence	SECURE DISPOSAL	Best Practice		Professional development plans should be held on the individual in the school and should be retained for the organisation, then retained for a period of 6 years.
3.1.7	School Development Plan					End of the plan + 3 years	When the plan is superseded or complete	SECURE DISPOSAL	Best Practice		
3.2	Operational Administration										
3.2.1	General file series which do not fit under any other category	Maybe				Current year + 6 years then review		SECURE DISPOSAL	Best Practice		Unless there is a specific reason to retain the records e.g. legal, these records can be destroyed.
3.2.2	Records relating to the creation and publication of the school brochure or prospectus					Current academic year + 3 years	When the records has been created or published	STANDARD DISPOSAL (SEE NOTES)	Best Practice		The school could preserve a copy for their archive, if not destroy.
3.2.3	Correspondence to the creation and distribution of circulars to staff, parent or outside					Current academic year + 1 year	When the record has been created or destroyed	STANDARD DISPOSAL	Best Practice		
3.2.4	Behind Privacy Notice which is sent to parents as part of GDPR compliance					Until superseded + 6 years		STANDARD DISPOSAL	Best Practice		
3.2.5	Records relating to the creation and distribution of circulars to staff, parent or outside	Yes				Current year + 1 year (see note)	When the record has been created or destroyed	SECURE DISPOSAL	Best Practice		
3.2.6	Visitor management systems (including electronic systems, entries books and sign-in or letters)	Yes				Current academic year + 1 year (see note)	Date the awareness has been produced or distributed	STANDARD DISPOSAL	Best Practice		Schools may decide to archive a copy.
3.2.7	Complaints - Minor (not safeguarding)	Yes				From the date the complaint is resolved + 3 years then review.		SECURE DISPOSAL	Best Practice		This disposal time is set in case of claims by parents or pupils about previous actions
3.2.8	Complaints - Major (not safeguarding)	Yes				From the date the complaint is resolved + 6 years then review.		SECURE DISPOSAL	Best Practice		
3.2.9	Complaints - Negligence or Safeguarding	Yes				From the date the complaint is resolved + 10 years if the complaint is resolved + 15 years if the complaint is not resolved		SECURE DISPOSAL	Limitation Act 1980		
3.2.10	Waiting list registers	Yes				Date of register + 6 years		SECURE DISPOSAL	Best Practice		The government and ICO are to issue guidance about the implementation of the GDPR requirements. The retention period for waiting list registers should be reviewed and updated.
3.3	Policy and Frameworks										
3.3.1	Complaints Policy	No				Life of the policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.2	Data Protection Policy	No				Life of the policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.3	Freedom of Information Policy	No				Life of this policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.4	Information Security Policy	No				Life of the policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.5	Special Educational Needs Policy	No				Life of the policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.6	Equality Information and Objectives Statement for publication	No				Life of the policy or policy superseded + 2 years. If major changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.7	Risk and Control Framework	No				Life of the framework or framework changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		
3.3.8	Rules and Bylaws	No				Life of the framework or framework changes are made to the policy then an archive copy of previous policies should be retained		SECURE DISPOSAL	Best Practice		

3.4.1	Strategic Review	No					Life of the review is until review is requested + 3 years. If major changes are made in the review then an archive copy of previous review should be retained.	SECURE DISPOSAL	Best Practice	
3.4.2	Strategic Plan (also known as School Development Plan)	No					Life of the plan is until plan is requested + 3 years. If major changes are made in the review then an archive copy of previous plan should be retained.	SECURE DISPOSAL	Best Practice	
3.4.3	Accountability Plan	No					Life of the review is until review is requested + 3 years. If major changes are made in the review then an archive copy of previous plan should be retained.	SECURE DISPOSAL	Best Practice	
3.5 Liaison with LEA DfE										
3.5.1	GOVERNOR reports and reports	No					Life of the report until review	SECURE DISPOSAL	Best Practice	
3.5.2	Letters made to senior government	No					Current year + 5 years	SECURE DISPOSAL	Best Practice	
3.5.3	Letters made to senior government	No					Current year + 5 years	SECURE DISPOSAL	Best Practice	
3.5.4	Circulars and other information sent from the Local Authority	No					Operational use	SECURE DISPOSAL	Best Practice	
3.5.5	Letters and other information sent from the Local Authority	No					Operational use	SECURE DISPOSAL	Best Practice	
3.5.6	Attendance sheets	Yes					Archived year + 1 year	SECURE DISPOSAL	Best Practice	
3.5.7	Secondary transfer sheets (primary)	Yes					Archived year + 2 years	SECURE DISPOSAL	Best Practice	

Record Category	Record Description	Personal Information (New Entry Form)	Department (Use Drop Down Menu for List of Departments)	Format (Use Drop Down Menu for List of Formats)	Location (Use Drop Down Menu for List of Locations)	Retention Period	Trigger Event	Final Disposition	Legal Basis/Statutory Provision	Sensitivity (Use drop down menu for categories)	Notes
8.1 Risk Management and Insurance											
8.1.1	Employer's Liability Insurance Certificate	No		Digital/Paper		Class of the School + 40 Years	Class of the School	SECURE DISPOSAL	When the school is no longer insured by the Employer's Liability Insurance	Public	
8.1.2	Insurance policies	No				From the policy expiry + 5 years + 10 years	From the policy expiry	SECURE DISPOSAL	Contract's Liability (Compulsory Insurance) Act 1989		
8.1.3	Records relating to the settlement of insurance claims	Yes				From claim expiry + 5 years	From claim expiry	SECURE DISPOSAL			
8.1.4	Anti Corruption and appointments of responsible officers	No				From the date of the appointment or resignation + 5 years	From the date of the appointment or resignation	SECURE DISPOSAL			Under the Companies Act members can request to have their details removed. On such a request review the records.
8.2 Asset Management											
8.2.1	Inventory of Furniture and Equipment	No				Current Year + 5 years	From the date of the inventory or when the item is disposed of or written off	SECURE DISPOSAL		Confidential	
8.2.2	Inventory of Staff and equipment report	Yes				Current Year + 5 years	From the date of the inventory or when the item is disposed of or written off	SECURE DISPOSAL		Confidential	
8.3 Accounts and Statements											
8.3.1	Annual Accounts	Yes				Current Year + 5 years	From the end of the financial year	SECURE DISPOSAL			
8.3.2	Accounts and grants managed by the school	Yes				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.3	Accounts and grants managed by the school including the annual budget statement and management of budgets	Yes				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.4	Accounts and grants managed by the school including the annual budget statement and management of budgets	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.5	Accounts and grants managed by the school including the annual budget statement and management of budgets	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.6	Accounts relating to the identification and management of the school's financial position	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.7	Accounts relating to the identification and management of the school's financial position	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.8	Accounts relating to the identification and management of the school's financial position	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.3.9	Accounts relating to the identification and management of the school's financial position	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.4 Pupil Finance											
8.4.1	Student grant applications	Yes				Current year + 3 years	From the end of the financial year or when the grant is exhausted	SECURE DISPOSAL			
8.4.2	Pupil Premium Fund records	Yes				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			
8.5 Contract Management											
8.5.1	All records relating to the management of contracts under seal	Yes				From the end of the contract + 10 years	From the end of the contract	SECURE DISPOSAL	Section 1 Education Act 1996		
8.5.2	All records relating to the management of contracts under seal	Yes				From the end of the contract + 10 years	From the end of the contract	SECURE DISPOSAL	Section 1 Education Act 1996		
8.5.3	Records relating to the monitoring of contracts	Yes				From the end of the contract + 10 years	From the end of the contract	SECURE DISPOSAL			Retention period is 6 years after contract ends or 12 years if the contract is subject to litigation or an investigation. A legal hold may apply to the records if the contract is subject to litigation or an investigation.
8.6 School Fees											
8.6.1	Charge Books	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.2	Paying in Books	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.3	Ledger	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.4	Invoice	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.5	Receipts	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.6	Bank Statements	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.7	Journal Books	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.8	VAT Returns	Yes				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL			Aligns with HMRC requirements and best practice for financial records
8.6.9	Guarantee Accounts Register	No				Current year + 5 years	From the end of the financial year or when the book is exhausted	SECURE DISPOSAL	Section 1 Education Act 1996		Aligns with HMRC requirements and best practice for financial records
8.7 School Meals Management											
8.7.1	Free school meals register (where the register is being used as a basis for funding)	Yes				Current year + 5 years	From the end of the financial year or when the register is exhausted	SECURE DISPOSAL			
8.7.2	Free school meals register (where the register is being used as a basis for funding)	Yes				Current year + 5 years	From the end of the financial year or when the register is exhausted	SECURE DISPOSAL			
8.7.3	School meals summary sheets	Yes				Current year + 5 years	From the end of the financial year or when the register is exhausted	SECURE DISPOSAL			
8.8 Funding											
8.8.1	Funding Agreement with Secretary of State and supplemental funding	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			Under the Education Act 2002, the Secretary of State may give or can have a right to give supplemental funding to a school in a multi-academy trust.
8.8.2	Funding Agreement - termination of the funding agreement	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			Under the Education Act 2002, the Secretary of State may give or can have a right to give supplemental funding to a school in a multi-academy trust.
8.8.3	Funding Agreement - termination of the funding agreement	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			Under the Education Act 2002, the Secretary of State may give or can have a right to give supplemental funding to a school in a multi-academy trust.
8.8.4	Funding Agreement - termination of the funding agreement	No				From the end of the financial year + 10 years	From the end of the financial year	SECURE DISPOSAL			Under the Education Act 2002, the Secretary of State may give or can have a right to give supplemental funding to a school in a multi-academy trust.

S.4.5	Pending Records Generated / Manual Entry (GAO)	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.4.6	Per mail handling records	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.4.7	Pending Records	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	Pending Appointments which says that the Academy can receive domestic aid can only change where the law says it can't. This is a violation of the law (see Cheating and Reinstatement Policy).
S.4.8	GAO Aid and Tax Report	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.4.9	Excursions Agreement	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	The Academy can enter into an agreement with a parent to allow a child to attend the Academy as long as the parent pays the tuition. If the parent does not pay the tuition, the Academy will not allow the child to attend. The Academy is a non-profit school.
S.4.10	Records relating to loans	No	Date of last payment on loan = 6 years Date of last payment on loan = 12 years if the loan is not repaid	SECURE DISQUAL	Best Practice	
S.4.11	Measurement of Endowment Funds	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.4.12	Measurement of Endowment Funds	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.5 Strategic Finance						
S.5.1	Financial Position	No	Financial statement = 4 years	SECURE DISQUAL	Best Practice	
S.5.2	Chartering and operations policy	No	Financial statement = 4 years	SECURE DISQUAL	Best Practice	
S.5.3	Chartering and operations policy	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.5.4	Chartering and operations policy	No	Date of last payment = 6 years	SECURE DISQUAL	Best Practice	
S.5.5	Chartering and operations policy	No	Financial year report related to 4-6 years	SECURE DISQUAL	Best Practice	
S.5.6	Chartering and operations policy	Yes	Financial year report related to 4-6 years	SECURE DISQUAL	Best Practice	

	Record Category	Record Description	Personal Use Drop-down Menu	Department Use Drop-down Menu	Personal Use Drop-down Menu	Location Use Drop-down Menu	Retention Period	Trigger Event	Final Disposition	Legal Basis/Statutory Provision	Sensitivity	Notes
7.1 Property Management	7.1	This record relates to the management of the school's property.	No				These records should be retained for 10 years from the date of creation.					
	7.1.1	This record relates to the management of the school's property.	No				These records should be retained for 10 years from the date of creation.					
	7.1.2	This record relates to the management of the school's property.	No				These records should be retained for 10 years from the date of creation.					
	7.1.3	This record relates to the management of the school's property.	No				These records should be retained for 10 years from the date of creation.					
	7.1.4	This record relates to the management of the school's property.	No				These records should be retained for 10 years from the date of creation.					
7.2 Maintenance	7.2	This record relates to the management of the school's maintenance.	No				These records should be retained for 10 years from the date of creation.					
	7.2.1	This record relates to the management of the school's maintenance.	No				These records should be retained for 10 years from the date of creation.					
	7.2.2	This record relates to the management of the school's maintenance.	No				These records should be retained for 10 years from the date of creation.					
	7.2.3	This record relates to the management of the school's maintenance.	No				These records should be retained for 10 years from the date of creation.					
	7.2.4	This record relates to the management of the school's maintenance.	No				These records should be retained for 10 years from the date of creation.					
7.3 Vehicles	7.3	This record relates to the management of the school's vehicles.	No				These records should be retained for 10 years from the date of creation.					
	7.3.1	This record relates to the management of the school's vehicles.	No				These records should be retained for 10 years from the date of creation.					
	7.3.2	This record relates to the management of the school's vehicles.	No				These records should be retained for 10 years from the date of creation.					
	7.3.3	This record relates to the management of the school's vehicles.	No				These records should be retained for 10 years from the date of creation.					
	7.3.4	This record relates to the management of the school's vehicles.	No				These records should be retained for 10 years from the date of creation.					
7.4 Governance	7.4	This record relates to the management of the school's governance.	No				These records should be retained for 10 years from the date of creation.					
	7.4.1	This record relates to the management of the school's governance.	No				These records should be retained for 10 years from the date of creation.					
	7.4.2	This record relates to the management of the school's governance.	No				These records should be retained for 10 years from the date of creation.					
	7.4.3	This record relates to the management of the school's governance.	No				These records should be retained for 10 years from the date of creation.					
	7.4.4	This record relates to the management of the school's governance.	No				These records should be retained for 10 years from the date of creation.					

	Record Category	Record Description	Personal Information Use Drop Down Menu	Department (Use Drop Down Menu for List of Departments)	Format (Use Drop Down Menu for List of Formats)	Location (Use Drop Down Menu for List of Locations)	Retention Period	Trigger Event	Final Disposition	Legal Basis/Statutory Provision	Sensitivity (Use drop down menu for categories)	Notes
8.1 Management of Government Body												
8.1.1		Instrument of government					For the life of the school. (see notes)		Consult local archives before disposal.	Best Practice		There are no permanent records as they are the responsibility of the governing body that establish the constitution of the governing body. They are retained for 10 years from the date of the governing body's dissolution, legal and governance reference.
8.1.2		Trusts and endowments					For the life of the school. (see notes)		Consult local archives before disposal.	Best Practice		There are no permanent records as they are the responsibility of the governing body that establish the constitution of the governing body. They are retained for 10 years from the date of the governing body's dissolution, legal and governance reference.
8.1.3		Records relating to the election of parent and end governors not nominated for the elections					Date of election + 6 months		SECURE DISPOSAL	Best Practice		There are no permanent records as they are the responsibility of the governing body that establish the constitution of the governing body. They are retained for 10 years from the date of the governing body's dissolution, legal and governance reference.
8.1.4		Records relating to the appointment of co-opted governors.					Provided the decision has been recorded in the minutes, the records relating to the appointment can be destroyed once the co-opted has finished their term of office. Where there have been allegations made against a child, in this case retain for 25 years.		SECURE DISPOSAL	Best Practice		There are no permanent records as they are the responsibility of the governing body that establish the constitution of the governing body. They are retained for 10 years from the date of the governing body's dissolution, legal and governance reference.
8.1.5		Records relating to the election of staff and vice chair					Once the decision has been recorded in the minutes, the records relating to the election can be destroyed.		SECURE DISPOSAL	Best Practice		There are no permanent records as they are the responsibility of the governing body that establish the constitution of the governing body. They are retained for 10 years from the date of the governing body's dissolution, legal and governance reference.
8.1.6		Scheme of delegation and terms of reference for committees					Permanent (see notes)	Where the document is superseded or ceases to be in force.	Consult local archives before disposal	Best Practice		Schools may wish to retain these records for reference purposes in case disputes need to be referred.
8.1.7		Minutes/Minutes	May/No				Current year		STANDARD DISPOSAL	Best Practice		
8.1.8		Agendas - principal copy	May/No				Recommended the agenda is stored with the principal set of the minutes		Consult local archives before disposal	Best Practice		
8.1.9		Minutes - principal set - signed	May/No				Permanent (see notes)	Date the minutes are signed and approved	Consult local archives before disposal.	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.10		Reports made to the governors' regarding brand functions	May/No				Permanent (see notes)	Date of the meeting at which the report was presented	Consult local archives before disposal	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.11		Reports relating to the management of the school - additional copies	Yes				Date of the last meeting in the book + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.12		Records relating to the management of the school - additional copies	Yes				Date of meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.13		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.14		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.15		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.16		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.17		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.18		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.19		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.1.20		Records relating to the management of the school - additional copies	Yes				Date of the meeting + 6 years		SECURE DISPOSAL	Best Practice		Although generally kept for the life of the school, records of the minutes are only retained to the Local Authority for 10 years from the date of the school's dissolution.
8.2 Governance Management												
8.2.1		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.2		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.3		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.4		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.5		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.6		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.7		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.8		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.
8.2.9		Records relating to the appointment of a clerk to the governing body	Yes				Date on which clerk appointment ceases + 5 years		SECURE DISPOSAL	Best Practice		The retention period (often 3 years, policy on RMAS guidance) starts when the clerk is formally ceased or no longer in effect.

6.2.10	Directors Disqualification	Yes				15 years from the date of disqualification		SECURE (UNFOUCL)	The Education Committee Director Disqualification Act 1986 Regulations 1999 Provisions (Disquali) Regulations 1994		
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	Record Category	Record Description	Personal Information (Use Drop Down Menu)	Department (Use Drop Down Menu for List of Departments)	Format (Use Drop Down Menu for List of Formats)	Location (Use Drop Down Menu for List of Locations)	Retention Period	Trigger Event	Final Disposition	Legal Basis/Statutory Provision	Security (Use drop down menu for categories)	Notes
8.1 Local Authority												
8.1.1		Secondary Transfer Sheets (primary)					Current year + 2 years		SECURE DISPOSAL	Best Practice		
8.1.2		Attendance registers	Yes				Current year + 1 year		SECURE DISPOSAL	Best Practice		
8.1.3		School census returns	Yes				Current year + 5 years		SECURE DISPOSAL	Best Practice		
8.1.4		Circulars and other information sent from the local authority					Operational use		SECURE DISPOSAL	Best Practice		
8.2 Central Government												
8.2.1		QUEST reports and papers - where a QP has been issued					Life of the report then review		SECURE DISPOSAL	Best Practice		
8.2.2		Memos made to central government					Current year + 6 years		SECURE DISPOSAL	Best Practice		
8.2.3		Circulars and other information sent from central government					Operational use		SECURE DISPOSAL	Best Practice		