



Lewknor Church of England Primary School

DATA RETENTION POLICY

May 2026 – May 2029



Our Christian Vision

At Lewknor C of E Primary School, the school community will work together to provide a nurturing school environment where all children are passionate about their learning and achieve their full potential. Caring for each other, caring for all aspects of children's health and caring for our futures will be the bedrock of what we do. We will create an exciting and challenging curriculum which will give our children, like the wise man who built his house on rock, the foundations for a happy and successful life.

Strapline

Building strong foundations for a happy, healthy and successful life

Our Values

Be Passionate, Be Caring, Be Healthy, Be Successful

Lewknor Church of England Primary School has a responsibility to maintain its records and record keeping systems. When doing this, the school will take account of the following factors:

- The most efficient and effective way of storing records and information;
- The confidential nature of the records and information stored;
- The security of the record systems used;
- Privacy and disclosure; and
- Their accessibility.

This policy does not form part of any employee's contract of employment and is not intended to have contractual effect. It does, however, reflect the school's current practice, the requirements of current legislation and best practice and guidance. It may be amended by the school from time to time and any changes will be notified to employees within one month of the date on which the change is intended to take effect. The school may also vary any parts of this procedure, including any time limits, as appropriate in any case.

DATA PROTECTION

This policy sets out how long employment-related and pupil data will normally be held by us and when that information will be confidentially destroyed in compliance with the terms of the General Data Protection Regulation (GDPR) and the Freedom of Information Act 2000.

Data will be stored and processed to allow for the efficient operation of the school. The school's Data Protection Policy outlines its duties and obligations under the GDPR.

RETENTION SCHEDULE

Information (hard copy and electronic) will be retained for at least the period specified in the attached retention schedule. When managing records, the school will adhere to the standard retention times listed within that schedule. Paper and electronic records for staff, health and safety, school development will be regularly monitored by Tom Powell (headteacher) as well as paper records for pupils (including accidents and risk assessments for off site visits). Other administration records will be regularly monitored by Gemma Pryce (administrator) and Sarah Atkinson (Finance Officer)

DESTRUCTION OF RECORDS

Where records have been identified for destruction they should be disposed of in an appropriate way. All information must be reviewed before destruction to determine whether there are special factors that mean destruction should be delayed, such as potential litigation, complaints or grievances.

All paper records containing personal information, or sensitive policy information should be shredded before disposal where possible. All other paper records should be disposed of by an appropriate waste paper merchant. All electronic information will be deleted.

RESPONSIBILITY AND MONITORING

Tom Powell (headteacher) has primary and day-to-day responsibility for implementing this policy. The Data Protection Officer Kirsy Pyy, in conjunction with the school is responsible for monitoring its use and effectiveness and dealing with any queries on its interpretation. The data protection officer will consider the suitability and adequacy of this policy and report improvements directly to management.

Internal control systems and procedures will be subject to regular audits to provide assurance that they are effective in creating, maintaining and removing records. Management at all levels are responsible for ensuring those reporting to them are made aware of and understand this policy and are given adequate and regular training on it.

RETENTION SCHEDULE

Lewknor C of E Primary retains Special Educational Needs and Disabilities (SEND) records for 25 years from the pupil's date of birth.

Pupil records ^			
Document type	Retention period	Action at end of retention period	Guidance/legislation
Primary school pupil records	Until the pupil leaves the school.		
	You should keep the pupil's data on your MIS for 2 terms after the pupil leaves the school. See the schools census guidance for details on reporting data after pupils leave.	Transfer to secondary school or other primary school when the pupil leaves.	See The Education (Pupil Information) (England) Regulations 2005 for details of what to keep in the record, and DfE guidance on how to transfer information to another school.
Secondary school pupil records			See The Education (Pupil Information) (England) Regulations 2005 for details of what to keep in the record.
	Until the pupil's 25th birthday.	Dispose of records securely. If the pupil leaves to go to another school, transfer the records to that school.	Retain as detailed in section 2 of the Limitation Act 1980 . See guidance on what to do if your school will close before the end of the retention period.

Child protection records



Document type	Retention period	Action at end of retention period	Guidance/legislation
Child protection files	Until the child's 25th birthday. If the file relates to child sexual abuse, retain until the child's 75th birthday.	Dispose of records securely. Child protection files should be passed on to any new school a child attends (transferred separately from the main pupil file).	Store either as a separate file or in a sealed envelope in the pupil file. Keeping Children Safe in Education sections 122 and 123. The Report of the Independent Inquiry into Child Sexual Abuse (IICSA), recommendation on access to records .
Allegations of child protection against a member of staff, including unfounded allegations	Until the staff member's normal retirement age, or 10 years from the date of the allegation, whichever is later.	Dispose of records securely.	Keeping Children Safe in Education and Working together to safeguard children .

Finance records



Document type	Retention period	Action at end of retention period	Guidance/legislation
Contracts	6 years from the last payment on the contract.	Dispose of records securely.	Section 2 of the Limitation Act 1980 .
Debtor's records	6 years from the end of the financial year.	Dispose of records securely.	Section 2 of the Limitation Act 1980 .
VAT records	6 years from the end of the financial year.	Dispose of records securely.	May include invoices, budgets, bank statements and annual accounts. Record keeping (VAT Notice 700/21) .

Governance records



Document type	Retention period	Action at the end of retention period	Guidance/legislation
Admissions	6 years from the admission date.	Dispose of records securely.	Regulation 7 of the School Attendance (Pupil Registration) (England) Regulations 2024.
Attendance registers	6 years from the date of entry.	Dispose of records securely.	Regulation 7 of the School Attendance (Pupil Registration) (England) Regulations 2024.
Annual governors' report	10 years.	Dispose of records securely.	The Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002. Retain as detailed in section 2 of the Limitation Act 1980.
Curricular record	At least 1 year.	Dispose of records securely.	The Education (School Records) Regulations 1989 and Regulation 3 of the Education (Pupil Information) (England) Regulations 2005.

Curricular record	At least 1 year.	Dispose of records securely.	The Education (School Records) Regulations 1989 and Regulation 3 of the Education (Pupil Information) (England) Regulations 2005 .
Directors – disqualification	15 years from the date of disqualification.	Dispose of records securely.	The Education (Company Directors Disqualification Act 1986: Amendments to Disqualification Provisions) (England) Regulations 2004 .
Records of educational visits	10 years from the date of the visit. If there was an incident on the visit, retain the permission slips for all pupils and the incident report in the pupil record, or until the pupil reaches the age of 25.	Dispose of records securely.	Health and safety on educational visits . Retain as detailed in section 2 of the Limitation Act 1980 .
School vehicles	6 years from the disposal of the vehicle.	Dispose of records securely.	Section 2 of the Limitation Act 1980 .
Statutory registers and compliance	Retention periods vary – e.g.: <ul style="list-style-type: none"> • Memorandums of understanding – for the life of the academy, plus 6 years • Annual reports – 10 years from the date of the report • Board meeting records – 10 years from the date of the meeting 	Dispose of records securely.	May include annual reports and governance records. Companies Act 2006 contains information on which statutory registers to keep. Compliance guidance in the maintained schools governance guide and the academy trust governance guide .

Health and safety records



Document type	Retention period	Action at end of retention period	Guidance/legislation
Accessibility plans	Life of plan plus 6 years.	Dispose of records securely.	Retain as detailed in section 2 of the Limitation Act 1980 .
Accident records	3 years from the date of the accident.	Dispose of records securely.	Accidents involving pupils should be retained in the pupil record. Regulation 25 of the Social Security (Claims and Payments) Regulations 1979 .
Monitoring exposure to substances hazardous to health, including asbestos	5 years.	Dispose of records securely.	The Control of Substances Hazardous to Health Regulations 2002 .
Health surveillance records	40 years.	Dispose of records securely.	The Control of Substances Hazardous to Health Regulations 2002 and Health surveillance – Record keeping .
Other health records of staff	While the worker is employed in your school.	Dispose of records securely.	The Control of Substances Hazardous to Health Regulations 2002 and Health surveillance – Record keeping .
Fire assessments	Life of the risk assessment plus 6 years.	Dispose of records securely.	The Regulatory Reform (Fire Safety) Order 2005 . Retain as detailed in section 2 of the Limitation Act 1980 .

Property records



Document type	Retention period	Action at end of retention period	Guidance/legislation
Maintenance records	6 years from the end of the financial year.	Dispose of records securely.	Record keeping (VAT Notice 700/21) .
Title deeds	12 years from the end of the deed.	Dispose of records securely.	Section 2 of the Limitation Act 1980 .

Staff records



Document type	Retention period	Action at end of retention period	Guidance/legislation
Copies of DBS certificates	6 months from the date of recruitment.	Dispose of records securely.	Keeping Children Safe in Education.
Maternity pay records	3 years after the end of the tax year in which the maternity pay period ends.	Dispose of records securely.	The Statutory Maternity Pay (General) Regulations 1986.
Pay records	3 years from the end of the tax year they relate to.	Dispose of records securely.	PAYE and payroll for employers: keeping records.
Personnel files	6 years from termination of employment.	Dispose of records securely.	Section 2 of the Limitation Act 1980.
Retirement benefits	A minimum of 6 years from the end of the year in which the accounts were signed.	Dispose of records securely.	Regulation 15 of the Retirement Benefits Schemes (Information Powers) Regulations 1995.