



CONTENTS

1.	Emails on server	3
2.	School specific records	3
3.	Individual pupils' records	4
4.	Safeguarding	4
5.	Corporate records	5
6.	Accounting records	5
7.	Contracts and Agreements	6
8.	Intellectual property records	6
9.	Employee / Personnel records	6
10.	Insurance records	7
11.	Environmental, Health & Data Protection	8

This protocol should be read in conjunction with the School's Data Protection Policy and Privacy Notice.



Data Retention Protocol

This table has been adapted from general advice from the ISBA.

Except where there is a specific statutory obligation to destroy records, it is misleading to treat these suggestions as prescriptive time 'limits'. Figures given are not intended as a substitute to exercise of thought and judgment; specific advice, depending on the circumstances, may be appropriate. Where any doubt exists, advice should be sought from the Chief Operating Officer or relevant SLT member. Advice in this area is regularly updated and in individual cases it may be appropriate to take specific legal advice.

Type of Record/Document	Retention Period
<p>1. EMAILS ON SERVER</p> <ul style="list-style-type: none"> • Pupil email account • Staff emails 	<p>Delete upon leaving school, or within one year.</p> <p>Routine deletion of historic emails after 2-3 years and delete account within 1 year of leaving school.</p>
<p>2. SCHOOL-SPECIFIC RECORDS</p> <ul style="list-style-type: none"> • Registration documents of School • Attendance Register • Minutes of Governors' meetings • Annual curriculum 	<p>Permanent (or until closure of the school)</p> <p>6 years from last date of entry, then archive.</p> <p>6 years from date of meeting</p> <p>From end of year: 3 years (or 1 year for other class records: e.g., marks / timetables / assignments)</p>



<p>3. INDIVIDUAL PUPIL RECORDS</p> <ul style="list-style-type: none"> • Admissions: application forms, assessments, records of decisions • Student immigration records • Examination results (external or internal) • Pupil file including: <ul style="list-style-type: none"> - Pupil reports and performance records - Pupil medical records (<i>not accidents</i>) • Special educational needs records 	<p>N.B. these records will contain personal data.</p> <p>25 years from date of birth (or up to 7 years from the pupil leaving). If unsuccessful: up to 1 year¹.</p> <p>Duration of student sponsorship plus min. 1 year</p> <p>7 years from pupil leaving school.</p> <p>ALL: 25 years from date of birth (subject where relevant to any material that may be relevant to potential historic claims: see below).</p> <p>Date of birth plus up to 35 years (risk assessed)</p>
<p>4. SAFEGUARDING</p> <ul style="list-style-type: none"> • Policies, procedures and insurance • DBS disclosure certificates (if held) • Accident / Incident reporting • Child Protection files 	<p>Keep a permanent record of historic policies.</p> <p>No longer than 6 months from decision on recruitment, unless police specifically consulted. A record of the checks being made must be kept on SCR / personnel file, but not the certificate itself.</p> <p>Keep on record for as long as any living victim may bring a claim (NB civil claim limitation periods can be set aside in cases of abuse). Ideally, files to be reviewed from time to time if resources allow and a suitably qualified person is available. ²</p> <p>If a referral has been made / social care have been involved / child has been subject of a multi-agency plan; or if any risk of future claim(s): indefinitely. ²</p>



<ul style="list-style-type: none"> • Video recordings of meetings 	<p>Where any one-on-one meetings of classes, counselling, or application interviews are recorded (e.g., for safeguarding purposes), a shorter-term retention policy is acceptable based on the DSL's view of how quickly a concern will likely be raised: e.g., 3-6 months or immediately upon DSL review.</p>
<p>5. CORPORATE RECORDS</p> <ul style="list-style-type: none"> • Certificates of Incorporation • Minutes, Notes and Resolutions of Boards or Management Meetings • Shareholder resolutions • Register of Members/Shareholders • Annual reports 	<p>e.g., OSEL</p> <p>Permanent (or until dissolution of the company)</p> <p>Minimum – 10 years</p> <p>Minimum – 10 years</p> <p>Permanent (minimum 10 years for ex members/shareholders)</p> <p>Minimum – 6 years</p>
<p>6. ACCOUNTING RECORDS</p> <ul style="list-style-type: none"> • Accounting records (<i>normally taken to mean records which enable a company's accurate financial position to be ascertained & which give a true and fair view of the company's financial state</i>) • Tax returns • VAT returns 	<p>Minimum – 3 years for private UK companies (except where still necessary for tax returns)</p> <p>Minimum – 6 years for UK charities (and public companies) from the end of the financial year in which the transaction took place.</p> <p>Minimum – 6 years</p> <p>Minimum – 6 years</p>



<ul style="list-style-type: none"> Budget and Internal financial reports 	<p>Minimum – 3 years</p>
<p>7. CONTRACTS AND AGREEMENTS</p> <ul style="list-style-type: none"> Signed or final/concluded agreements (<i>plus any signed or final/concluded variations or amendments</i>) Deeds (or contracts under seal) 	<p>Minimum – 7 years from completion of contractual obligations or term of agreement, whichever is the later</p> <p>Minimum – 13 years from completion of contractual obligation or term of agreement</p>
<p>8. INTELLECTUAL PROPERTY RECORDS</p> <ul style="list-style-type: none"> Formal documents of title (trademark or registered design certificates; patent or utility model certificates) Assignments of intellectual property to or from the school IP / IT agreements (including software licenses and ancillary agreements e.g., maintenance; storage; development; coexistence agreements; consents) 	<p>Permanent (in the case of any right which can be permanently extended, e.g., trademarks); otherwise, expiry of right plus minimum of 7 years.</p> <p>As above in relation to contracts (7 years) or, where applicable, deeds (13 years).</p> <p>Minimum – 7 years from completion of contractual obligation concerned or term of agreement</p>
<p>9. EMPLOYEE / PERSONNEL RECORDS</p> <ul style="list-style-type: none"> Single Central Record of employees Contracts of employment 	<p><i>NB these records will contain personal data.</i></p> <p>Keep a permanent record that mandatory checks have been undertaken.</p> <p>7 years from effective date of end of contract</p>



<ul style="list-style-type: none"> • Employee appraisals or reviews • Staff personnel file • Payroll, salary, maternity pay records. • Pension or other benefit schedule records • Job application and interview/rejection records (unsuccessful applicants) • Staff immigration records (Right to work, etc.) • Tier 2 migrant worker sponsor records • Health records relating to employees. • Records of low-level concerns about adults 	<p>Duration of employment plus minimum of 7 years</p> <p>As above, but <u>do not delete any information which may be relevant to historic safeguarding claims.</u></p> <p>Minimum – 6 years</p> <p>Potentially permanent (i.e., lifetimes of those involved), depending on nature of scheme.</p> <p>Minimum 3 months but no more than 1 year (as CVs will rapidly be out of date)</p> <p>Minimum – 2 years from end of employment</p> <p>Minimum – 1 year from end of employment</p> <p>7 years from end of employment</p> <p>At least until end of employment (as recommended by KCSIE), then subject to review for relevance: e.g., 7 years from end of employment if they have ongoing relevance for employment claims, longer if necessary for safeguarding purposes / claims.</p>
<p>10. INSURANCE RECORDS</p> <ul style="list-style-type: none"> • Insurance policies 	<p>Duration of policy (or as required by policy) plus a period for any run-off arrangement and coverage of insured risks: ideally, until it is possible to calculate that no living person could make a claim.</p>



<ul style="list-style-type: none"> Correspondence related to claims/ renewals/ notification re: insurance 	<p>Minimum – 7 years (<i>but this will depend on what the policy covers and whether e.g., historic claims may still be made – refer to COO</i>)</p>
<p>11. ENVIRONMENTAL, HEALTH & DATA</p> <ul style="list-style-type: none"> Maintenance logs Accidents to children ⁴ Accident at work records (staff) ⁴ Staff use of hazardous substances ⁴ Covid-19 risk assessments, consents etc. Risk assessments (carried out in respect of above) ⁴. Art.30 GDPR records of processing activity, data breach records, impact assessments 	<p>10 years from date of last entry</p> <p>25 years from birth (longer for safeguarding)</p> <p>Minimum – 4 years from date of accident, but review case-by-case where possible</p> <p>Minimum – 7 years from end of date of use</p> <p>Retain for now legal paperwork (consents, notices, risk assessments) but not individual test results.</p> <p>7 years from completion of relevant project, incident, event or activity.</p> <p>No limit (as long as no personal data held), but must be kept up-to-date, accurate and relevant.</p>

Be aware that latent injuries can take years to manifest, and the limitation period for claims reflects this. Therefore, keep a note of all procedures as they were at the time, plus a record that they were followed, and relevant insurance documents.