



E.	Management of the School		
E. 1	Governing Body		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
E.1.1	Agendas for Governing Body meetings	A digital version is held within the data share 'Governors' indefinitely.	All hard copies are destroyed by shredding.
E.1.2	Minutes of Governors meetings	One signed hard copy is kept in the Governors' minute book and a digital version in the data share 'Governors' indefinitely.	
	Final signed copy of the approved minutes	Retained indefinitely	
	Inspection Copies	Date of meeting + six years to the end of the next full inspection.	If these minutes contain any sensitive, personal information they must be shredded.
E.1.3	Reports presented to the Governing Body	All files presented to the Governors are kept digitally within the data share 'Governors' indefinitely.	Retained with the signed set of the minutes in the School's Archives.
E.1.4	Instruments of Governance, including Articles of Association	Retained indefinitely	Hard copy files (where applicable) and digital files should be retained in the School's Archives whilst the school is open and then offered to County Archives Service when the School closes.
E.1.5	Trusts and Endowments managed by the Governing Body	Retained indefinitely	Hard copy files (where applicable) and digital files should be retained in the School's Archives whilst the school is open and then offered to County Archives Service when the School closes.



E.1.6	Action plans created and administered by the Governing Body	Retained indefinitely	Hard copy files (where applicable) and digital files should be retained in the School's Archives whilst the school is open and then offered to County Archives Service when the school closes.
E.1.7	Policy documents created and administered by the Governing Body	Retained indefinitely	The information is kept as a historic record digitally in the data share 'Policies'.
E.1.8	Records relating to complaints dealt with by the Governing Body	Date of the resolution of the complaint until the pupil reaches the age of 25 then review for further retention.	SECURE DISPOSAL
E.1.9	Annual Reports created under the requirements of the Education (Governors' Annual Reports) (England) (Amendment) Regulations 2002	Hard copies of accounts (including the Governors' Report) are held within the Bursary and digitally in the support staff data share. The information is retained indefinitely.	

E.2	The Headmaster and Senior Management Team		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
E.2.1	Minutes of Senior Management Team meetings and the meetings of other internal administrative bodies	Date of the meeting + three years then review	SECURE DISPOSAL
E.2.2	Reports created by The Headmaster or the Management Team	Date of the report + a minimum of three years then review	SECURE DISPOSAL
E.2.3	Records created by The Headmaster, Deputy Head, Heads of Year and other members of staff with administrative responsibilities	In accordance with staff file retention.	SECURE DISPOSAL



E.2.4	Correspondence created by The Headmaster, Deputy Head, Heads of Year and other members of staff with administrative responsibilities	In accordance with staff file retention.	SECURE DISPOSAL
E.2.5	Professional Development Reviews (PDRs)	In accordance with staff file retention.	SECURE DISPOSAL
E.2.6	School Development Plans	Retained indefinitely	

E.3	Admissions Process		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
E.3.1	All records relating to the creation and implementation of the School Admissions' Policy	Retained indefinitely	The information is kept as a historic record digitally in the data share 'Policies'.
E.3.2	Admissions – if the admission is successful	In accordance with pupil file retention policy.	The information is kept as a historic record digitally in the data share 'Policies'.
E.3.3	Register of Admissions	Current year + three years then they are collapsed and moved to Archive	
E.3.4	Proofs of address supplied by parents as part of the admissions process	For the period the pupil is within the School and then archived in accordance with pupil file retention policy.	SECURE DISPOSAL
E.3.5	Supplementary Information form including additional information such as religion, medical conditions etc		
	For successful admissions	This information should be added to the pupil file and retained in line with the pupil file.	SECURE DISPOSAL
	For unsuccessful admissions	Retained for ten years in case the pupil reapplies.	SECURE DISPOSAL



E.3	Operational Administration		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
E.3.1	Records relating to the creation and publication of the school brochure or prospectus	Keep indefinitely. On file for seven years, then archived electronically.	
E.3.2	Records relating to the creation and distribution of circulars to staff, parents or pupils	Three years then archived electronically.	
E.3.3	Newsletters and other items with a short operational use	Current year + one year then archived electronically.	
E.3.4	Visitors' Books and Signing in Sheets	Current year + six years then review	SECURE DISPOSAL
E.3.5	Records relating to the creation and management of Parent Teacher Associations and/or Old Pupils Associations	Current year + six years then REVIEW	SECURE DISPOSAL

F	Human Resources		
F.1	Recruitment		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
F.1.1	All records leading up to the appointment of a new member of staff – unsuccessful candidates	Date of interview + * retain CV for six months * six months interview paperwork and scoring (all) * ID document disposed of immediately	SECURE DISPOSAL
F.1.2	All records leading up to the appointment of a new member of staff – successful candidate	All the relevant information should be added to the staff personal file (see below) and all other information retained for six months	SECURE DISPOSAL
F.1.3	Pre-employment vetting information – DBS Checks	Date of check + six months	SECURE DISPOSAL



F.1.4	Proofs of identity collected as part of the process of checking “portable” enhanced DBS disclosure	In line with staff file retention.	
F.1.5	Pre-employment vetting information – Evidence proving the right to work in the United Kingdom	Where possible these documents should be added to the Staff Personal File [see below], but if they are kept separately then the Home Office requires that the documents are kept for termination of Employment plus not less than two years.	

F.2	Operational Staff Management		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
F.2.1	Staff Personal File	Retained indefinitely.	
F.2.2	Timesheets	In line with staff file.	
F.2.3	Annual appraisal/ assessment records	In line with staff file.	

F.3	Management of Disciplinary and Grievance Processes		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
F.3.1	Allegation of a child protection nature against a member of staff including where the allegation is unfounded	Retained indefinitely	
F.3.2	Disciplinary Proceedings	In line with staff file (although will become inactive in line with disciplinary policy)	



F.4 Health and Safety			
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
F.4.1	Health and Safety Policy Statements	Retained indefinitely	
F.4.2	Health and Safety Risk Assessments	Life of risk assessment - it is updated rather than a new one carried out.	
F.4.3	Records relating to accident / injury at work	Retained indefinitely owing to risk of latent injury	
F.4.4	Incident Reporting (H&S)		
	Adults	Retained indefinitely	
	Children	Retained indefinitely	
F.4.5	Control of Substances Hazardous to Health (COSHH) assessment	Current year + 40 years	SECURE DISPOSAL

F.5 Payroll and Pensions			
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
F.5.1	Maternity pay records	In accordance with staff file retention	
F.5.2	Records held under Retirement Benefits Schemes (Information Powers) Regulations 1995	In accordance with staff file retention	

G Financial Management of the School			
G.1 Risk management and Insurance			
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
G.1.1	Employer's Liability Insurance Certificate	Closure of the School + 40 years	SECURE DISPOSAL



G.2	Asset Management		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
G.2.1	Inventories of furniture and equipment	Current year + six years	SECURE DISPOSAL

G.3	Accounts and Statements including Budget Management		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
G.3.1	Annual Accounts	Current year + six years then archive electronically	
G.3.2	Loans and grants managed by the school	Date of late payment on the loan + 12 year then review	SECURE DISPOSAL
G.3.3	Parent & Student financial support grant applications	In accordance with pupil file retention.	SECURE DISPOSAL
G.3.4	All records relating to the creation and management of budget including the Annual Budget statement and background papers	Life of the budget + three years. Historic documents retained in the Data share.	SECURE DISPOSAL
G.3.5	Invoices, receipts, order books and requisitions, delivery notices	Current financial year + one year until after audit then digitally archived. Fees invoices In accordance with pupil file retention.	
G.3.6	Records relating to the collection and banking of monies	Current year + one year until after audit then digitally archived.	
G.3.7	Records relating to the identification and collection of debt	In accordance with pupil file retention.	



G.4 Contract Management			
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
G.4.1	All records relating to the management of contracts under seal	Last payment on the contract + 12 years and review	SECURE DISPOSAL
G.4.2	All records relating to the management of contracts under signature	Last payment on the contract + six years and review	SECURE DISPOSAL
G.4.3	Records relating to the monitoring of contracts	Current year + two years	SECURE DISPOSAL

G.5 School Fund			
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
G.5.1	School fund - cheque books (hard copy)	Current year + six years then archived electronically.	
G.5.2	School fund - paying in books (hard copy)	Current year + six years then archived electronically.	
G.5.3	School fund - ledger (electronic)	Current year + six years then archived electronically.	
G.5.4	School fund - invoice (hard copy on pupil files and / or electronic)	Current year + six years then archived electronically or in accordance with pupil file.	
G.5.5	School fund - receipts	Current year + six years then archived electronically.	
G.5.6	School fund - bank statements	Current year + six years then archived electronically.	



H	<u>Property Management</u>		
H.1	Property Management		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
H.1.1	Title deeds of properties belonging to the school	PERMANENT - These should follow the property unless the property has been registered with the Land Registry	
H.1.2	Plans of property belong to the school	These should be retained whilst the building belongs to the school and should be passed onto any new owners if the building is leased or sold.	
H.1.3	Leases of property leased by or to the school	Expiry of lease + six years then archived.	
H.1.4	Records relating to the letting of school premises	Current financial year + six years	SECURE DISPOSAL
H.1.5	House on Hampton School Site (Keeper's Cottage)	Rental agreements are placed on staff files and stored in accordance with retention for staff files. Servicing - six years HMO Licence - end of licence + six years	SECURE DISPOSAL
H.1.6	Property next to Pre-Prep School	Rental - six years from end of tenancy Servicing - six years HMO Licence - end of licence + six years	SECURE DISPOSAL



H.1.7	Priory Gardens	Rental agreements are placed on staff files and stored in accordance with retention for staff files. Servicing - six years HMO Licence - end of licence + six years	SECURE DISPOSAL
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H.2	Maintenance		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
H.2.1	All records relating to the maintenance of the school carried out by contractors	Current year + six years	SECURE DISPOSAL
H.2.2	All records relating to the maintenance of the school carried out by school employees including maintenance log books	Current year + six years	SECURE DISPOSAL
H.2.3	Operations manuals for building works	Indefinitely	

I	Regulatory		
I.1	School Regulation		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
I.1.1	ISI reports and papers	Life of the report then REVIEW	SECURE DISPOSAL
I.1.2	Circulars and other information sent from central government	Operational use	SECURE DISPOSAL

I.2	Legal ownership		
Provision	Basic file description	Retention Period [Operational]	Action at the end of the administrative life of the record
I.2.1	Intellectual property	Retained indefinitely.	Archive if rights not current